DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION

NevadaEPro User Manual

Revised: September 2020

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1. NEVADAEPRO GENERAL INFORMATION

NevadaEPro is the State of Nevada eProcurement system implemented January 23, 2018, to improve transparency in government spending, automate and standardize the procurement and purchasing process, and improve overall efficiency in the procurement and purchasing process within state government. This user manual provides an overview of the functions of *NevadaEPro* and includes instructions for creating and processing documents within *NevadaEPro*. Refer to ***Section 4.0, Accessing the Website*** for login instructions.

2. TERMS/DEFINITIONS

Terms	Definitions
Approvers	Approvers of the document can edit/correct account coding while the requisition is in ready for approval status but not any other fields.
Bid Available Date	Bid available date is when the public can view the Bid Solicitation.
Bid Opening Date	Bid opening date is when users can review the quotes. Last date vendors can submit their quotes.
Bid Solicitation	Request for Proposal (RFP), Request for Information (RFI), Request for Quotation (RFQ).
Blanket	Purchase method that allows requestors to create a release requisition from a Master Blanket Purchase Order (MBPO) for ongoing purchases. Any contract that goes beyond a fiscal year (more than one [1]).
Blanket (Hosted)	Direct Release.
Blanket (Custom)	Standard Release.
Catalog	Commodities and services available to procure from existing MBPO.
Change Order	Any change to any type of Purchase Order (PO) after the PO has been approved or is in sent status.
Central Contracts Unit	Unit responsible for the management and monitoring of statewide contracts (SWC) and participating addendums (PA).
Cloning	Provides the ability to clone certain documents for goods/services that may be used/ordered again. A document can be cloned and then updated for the current requirements. The department and location are not carried over on a cloned document. It resets to the user's defaults so the document must be checked to make sure it has the correct department and location.

Terms	Definitions
Custom Columns	Custom columns are custom fields that are in ***bold*** to distinguish them from standard fields. Custom fields are used to identify unique or specific questions to be answered as various documents are created within *NevadaEPro.*
Department (Organization)	Used to define using agency.
Direct Open Market (DOM)	Goods under $5,000.00 – no contract. Direct Open Market requisitions auto-convert to PO and send to the vendor upon approval of the requisition, bypassing approval the second time.
Direct Release	Release type. Requisition does not require action by the Basic Purchasing (BP) User; PO is released directly to the vendor.
Division	Department within *NevadaEPro.*
Dollars	Receipt type. Typically used when the cost is not fixed.
G2B = Punchout	Government to Business. G2B is the integration of government software with businesses to exchange transaction data between *NevadaEPro* and the G2B enabled vendor system (Punchout). All G2B contracts should be direct release. PO is released directly to the vendor.
G2B Blanket	Purchase method that allows requestors to create a release requisition from an MBPO through the vendor's enabled G2B website. A custom line item description of commodities and/or services that are available to procure from an existing MBPO and do not have an enabled punchout.
Header Tab	Header tabs apply to the document in total.
Hosted Catalog	A custom line item description of commodities and/or services that are available to procure from an existing MBPO and do not have an enabled punchout. A hosted catalog includes basic contract information (price, description, etc.) about the vendor's product and uploaded into *NevadaEPro.*
Inventory	Order from an internal supply warehouse. ***Note: NevadaEPro is currently not configured for this functionality.***
Location (Budget Code)	Identifies the budget account for each agency.
Narrative	Allows users to add a narrative; e.g., for a bid solicitation.
Notes	Notes capture internal notes in *NevadaEPro* and are internal only. Notes are digital sticky notes.

Terms	Definitions
Open/Rolling Enrollment Bids	Bids that either have no time limit for submitting responses or bids that have a recurring response period each year.
Open Market (OM)	Purchase method that allows requestors to create a one-time requisition for commodities and/or services that do not have an MBPO. Open market is a release type that must be manually converted by a BP User after approval, allows for changes to the PO prior to sending, and therefore, requires approval again before sending. Goods over $5,000.00 – no contract or initiating a service contract regardless of value.
Organization (Org)	Each department has a unique organization ID (Org ID) used to identify the department in *NevadaEPro.*
PO	Purchase Order.
Print Sequence	Change print sequence in the order you want items to show on a document; e.g., narrative item should always be first.
Punchout	Commodities that are available to procure from an existing MBPO through the vendor's enabled G2B website.
Quantity	Receipt type which is typically used when the cost is fixed (e.g., punchouts and hosted catalogs).
Red Warning Messages	Must be corrected before submitting a document.
Release – G2B Punchout	Orders from a contract (statewide or agency contract) for both goods or services.
Reminders	Reminders are mutually exclusive of approvals. The reminders are set for a specific person and provide an alert and due date for action to be taken on specific documents. Reminders are time and date stamped when they are entered and when completed. Can mark a reminder to send an email.
Requisition	Documents used to request goods and/or services. There are two (2) types of requisitions: Release and Open Market.
Req Supervisor	Can act (take over) on documents created by other requisitioners in that department/location.
RPA	Request for Payment Authorization – after the fact approval (confirming order), no contract, both goods and services. RPAs auto convert to PO and are sent to the vendor, bypassing approval the second time.

Terms	Definitions
RPA Release	Release Prior Authorization (RPA) is a release type. An RPA is an after-the-fact requisition (confirming order), which allows requestors to enter the requisition after services/commodities have been received. No contract. RPA type requisitions auto convert to PO and are sent to the vendor upon approval of the requisition, bypassing approval the second time.
Save & Continue	Saves the users work and stays on the page.
Save & Exit	Saves the users work and takes the user to the next page. When in a dropdown, use save and exit, and it will populate the document.
Standard Release	Release type. Standard release must be manually converted by a BP User after approval, allows for changes to the PO prior to sending, and therefore, requires approval again before sending. PO is released to the vendor by the BP User. Utilized for statewide contracts (SWC) for services for a single item.
Statewide Contract (SWC)	A contract (blanket) for services and/or commodities that may be mandatory or permissive for the benefit of State and local government entities.
Subtabs	Subtabs are item specific.
Superusers	Can edit other DA User's documents in that department/location while they are in progress.
Tags	Keywords used for catalog searches.
UOM	Unit of Measure.
Yellow Warning Messages	Do not prevent a document from being submitted for approval. The warning lets the user know there might be an issue.

3. SYSTEM OVERVIEW

3.1 FUNCTIONAL USER ROLES

3.1.1 *NevadaEPro* is a role-based access e-Procurement system.

3.1.2 Every user with login access to *NevadaEPro* must have at least one (1) user role.

3.1.3 User roles determine the purchasing and administrative functions a user is able to access.

3.1.4 The table below lists the three (3) user roles that agencies will use to create, approve and process documents within *NevadaEPro*.

FUNCTIONAL USER ROLES IN NEVADAEPRO		
Role	**Primary Functions**	**Identified Users**
Basic Purchasing (BP)	Process Requisitions Conduct Solicitations - Open - Award Manage Contracts - Upload Items Issue Purchase Orders (PO) Receive Items	Purchasing/Procurement Contract Managers
Department Access (DA)	Create Requisitions - Obtain Informal Quotes - Request Change on PO Approve Documents Receive Items Manage Informal Quotes	End-Users (original Requestors within Agencies) Approvers Business Managers Budget Central Receiving
Accounts Payable (AP)	Create Invoices and Submit for Approval Approve Documents as an AP Supervisor	Accounting Unit

3.2 SYSTEM HIERARCHY

3.2.1 The basic structure of *NevadaEPro* organizes data including documents, users and approvals.

NEVADAEPRO SYSTEM HIERARCHY	
Current State Structure	***NevadaEPro* Structure**
Department	Organization
Agency	Department
Location	Budget Code

3.3 GENERIC PROCUREMENT LIFE CYCLE – SIX (6) STEPS

3.3.1 Create a Requisition
3.3.2 Convert to a Bid Solicitation
3.3.3 Solicitation Published
3.3.4 Vendors Respond with Quotes
3.3.5 Evaluate Quotes
3.3.6 Create Contract/Purchase Order

3.4 DOCUMENT OVERVIEW

3.4.1 Documents within *NevadaEPro* are used to conduct purchasing activities.

3.4.2 Users must create and submit documents in order to request items, conduct solicitations, establish contracts and order, receive and ultimately pay for items.

3.4.3 The following table identifies the various documents that can be created within *NevadaEPro.*

DOCUMENT OVERVIEW		
Document Type	**Purpose**	**Created By**
Requisition	Request on-contract goods and/or services Request off-contract goods and/or services	Department Access Basic Purchasing
Bid Solicitation	Conduct formal and informal solicitations Create and publish solicitation amendments Close response period Access the Bid Tabulation (Bid Tab) document	Basic Purchasing
Bid Tab	View and evaluate solicitation responses Request clarifications and revisions to responses Recommend vendors for award Convert awards to purchase orders and contracts	Basic Purchasing
Quote	Response to a solicitation	Seller (Vendor)
Purchase Order (PO)	Send orders to vendors Setup and manage term contracts	Basic Purchasing

DOCUMENT OVERVIEW		
Document Type	**Purpose**	**Created By**
Change Order (CO)	Manage change orders Manage contract amendments Access via purchase order	Department Access - Initiate - Approve Basic Purchasing - Initiate - Approve - Apply
Receipt	Record receipt Return of ordered goods and/or services Cancellation of ordered goods and/or services Access via purchase order	Department Access (optional) Basic Purchasing
Invoice	Document invoices received from Vendors against the PO and Receipt to facilitate a three (3) way match Approve to send payable transactions to the State's financial system	Accounts Payable

3.5 DOCUMENT STATUS OVERVIEW

3.5.1 As documents are processed, their status changes in order to allow/disallow various functions associated with the document.

3.5.2 Depending on the status of a document, it may become accessible and/or editable to specific users.

3.5.3 When documents require the action of a specific user, an email is automatically sent to that user to alert them.

3.5.4 Authorized Superusers are DA Users designated as 'Superusers' for either the departments or locations for which they have privileges.

3.5.5 Department Superusers can edit any requisition designated for a department for which they have privileges.

3.5.6 Location Superusers can edit any requisition designed for a location for which they have privileges.

3.5.7 The table below lists the status of documents within *NevadaEPro.*

DOCUMENT STATUS OVERVIEW			
Status	**Purpose**	**Available Actions**	**Actions Permitted By**
In Progress	The initial status of new documents. The document is still being completed by the creator.	Edit Submit for Approval Clone (creates a new copy of the document Cancel	Creator Authorized Users
Ready for Approval	The document has been submitted for approval and is going through one (1) or a series of approval paths.	Approval/Disapproval Edit (accounting and commodity code information only) Clone Cancel	Current Approver
Ready for Purchasing	The document has been approved and procurement must decide whether to conduct a solicitation (for off-contract requisitions), purchase the items or disapprove them.	Convert to Bid (for Open Markets Convert to Purchase Order Disapprove Clone Cancel	BP User
Returned	The document was disapproved by an approver.	Reopen (returns document to 'In Progress' Status) Clone Cancel	Creator Authorized Users
Ready to Send	The document has been approved and is ready to be sent to a Vendor or Vendors.	Send to Vendor(s) Clone Cancel	Creator Authorized Users

DOCUMENT STATUS OVERVIEW			
Status	**Purpose**	**Available Actions**	**Actions Permitted By**
Sent	The document has been sent to a Vendor or Vendors.	Clone Cancel	Creator Authorized Users
Cancelled	The document has been cancelled by the creator or an authorized user for the document's business unit(s).	Clone	Creator Authorized Users

3.6 REQUISITION TYPES

REQUISITION TYPES	
Current State Process	***NevadaEPro* Document Type**
Off-Contract Commodities Purchase Under $5,000.	Open Market Requisition with Informal Quote on Vendor Tab Convert to Open Market PO
Off-Contract Commodities Purchase $5,000 to $49,999, ***except weapons, vehicles and Information Technology (IT).***	Open Market Requisition with Informal Quote on Vendor Tab Convert to Open Market PO
Off-Contract Services Purchase Under $2,000.	Open Market Requisition with Informal Quote on Vendor Tab Convert to Open Market PO
Off-Contract Services Purchase Under $2,000 to $24,999.	Open Market Requisition with Informal Quote on Vendor Tab Convert to Open Market PO
Off-Contract Services Purchase $25,000 to $99,999.	Bid Solicitation Convert to Open Market PO
Off-Contract Commodities Purchase $50,000 and Greater.	Open Market Requisition Bid Solicitation Convert to Open Market PO

REQUISITION TYPES	
Current State Process	***NevadaEPro* Document Type**
Weapons, Vehicles and Information Technology (IT).	Open Market Requisition Bid Solicitation Convert to Open Market PO
On-Contract Commodities or Services Purchase Under $5,000.	Release Requisition to Direct Release PO (including G2B Punchouts)
On-Contract Commodities or Services Purchase Orders over $5,000 and Weapons, Vehicles and IT On-Contract.	Release Requisition to Direct Release PO (including G2B Punchouts)
Statewide Contracts (SWC) for Information Technology, Landscaping, Painting, and other services for which Vendors are qualified and a response to a work order request is required to select Vendor.	Release Requisition to Solicitation Enabled Master Blanket

3.7 APPROVAL TYPES/PATHS

NevadaEPro provides functionality for approval types and approval paths based on the following:

3.7.1 Dollar Range

3.7.2 User Role (document submitted by)

3.7.3 Document Type/Subtype (Requisition, Bid Solicitation, Purchase Order, etc.)

3.7.4 Organization/Department/Location

3.7.5 NIGP Code

3.7.6 Accounting Segment/String

3.7.7 Percentage or Dollar Increase (Change Order)

4. ACCESSING THE WEBSITE

4.1 INITIAL USER ACCOUNT PASSWORD

Step	Initial User Account Password Process Steps
1	Once a user’s account is setup in *NevadaEPro*, the user will receive an email with an initial password. ***Note: The initial password will have to be changed the first time a user logs into NevadaEPro.***
2	Click the  in the top right corner and go to ‘My Account’ and add a security question.

4.2 PASSWORD REQUIREMENTS

4.2.1 Passwords cannot be changed more than one (1) time per day;

4.2.2 Passwords must be changed at least every 90 days;

4.2.3 Passwords must be between 8 and 50 characters, and contain at least one letter, one number, and one special character (!"#$%&()*+,./:;<=>?@\[\]^_{|}~]+); and

4.2.4 The last 10 passwords cannot be reused.

4.3 LOGIN – PRODUCTION WEBSITE

4.3.1 **https://nevadaepro.com**
4.3.2 Click ‘Sign In’
4.3.3 Enter the Login ID
4.3.4 Enter the Password
4.3.5 Click ‘Sign In’

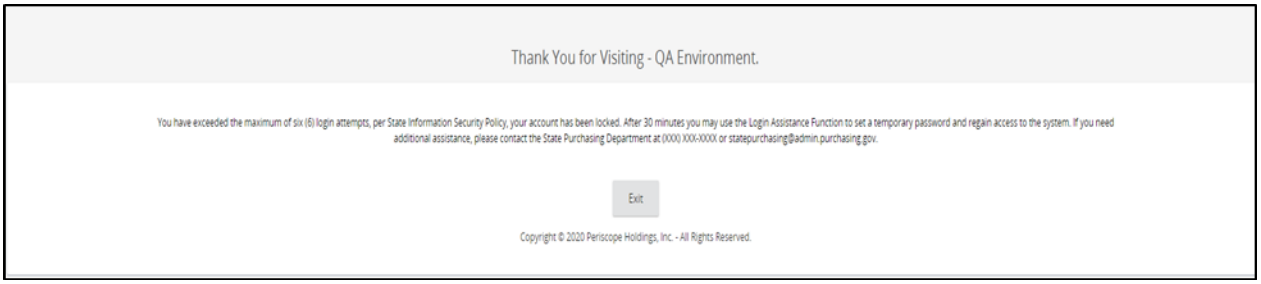
4.4 LOGIN – TRAINING WEBSITE

4.4.1 **https://train.nevadaepro.com**
4.4.2 Click ‘Sign In’
4.4.3 Enter the Login ID
4.4.4 Enter the Password
4.4.5 Click ‘Sign In’

4.5 LOGIN SUPPORT

4.5.1 **User Lockout** - The user will be locked out for 30 minutes after three (3) unsuccessful login attempts.

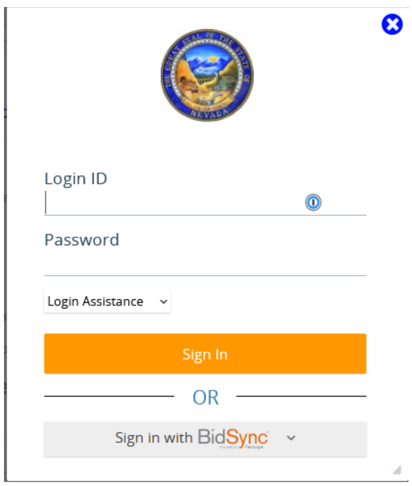
4.5.2 The user will be presented with a notification of the lockout and of the lockout period.



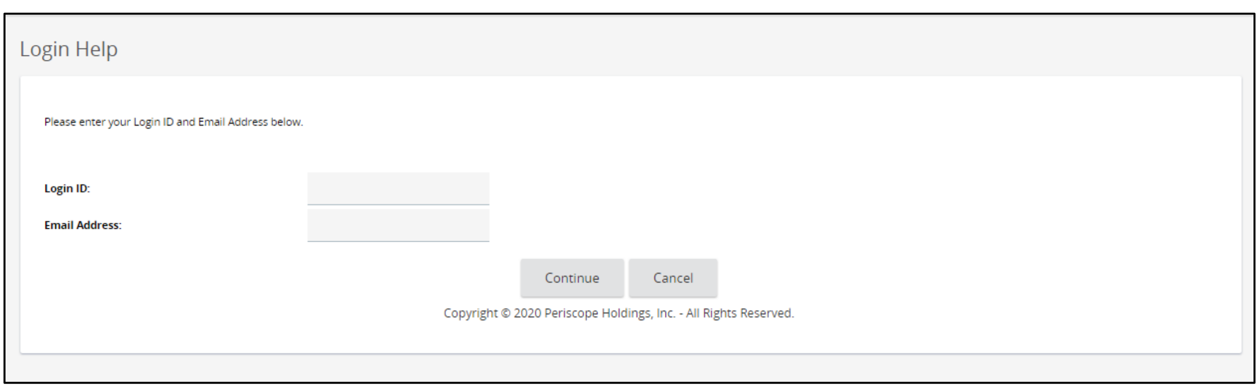
4.5.3 Exit – When selected, the user is navigated back to the login view.

4.5.4 After 30 minutes, the user must use the Login Assistance and request a new temporary password.

4.5.4.1 Click Sign In.
4.5.4.2 Click Login Assistance.
4.5.4.3 Select Forgot Password.



4.5.4.4 Enter your Login ID.
4.5.4.5 Enter your Email Address.
4.5.4.6 Select Continue.

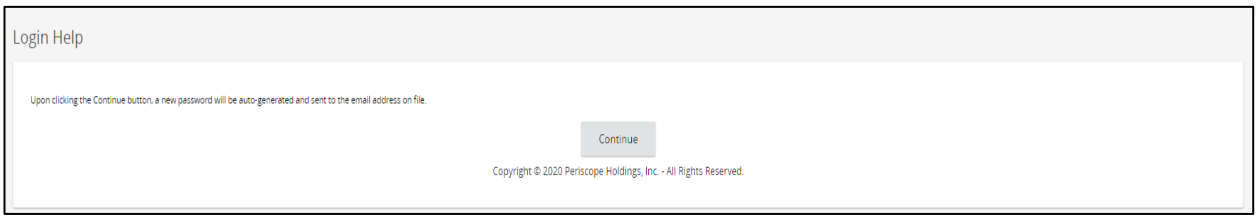


4.5.5 As the user continues, the login help view is refreshed with the user's login question and login answer entry field to enter their reply.

4.5.5.1 Enter the answer to the Login Question in the Login Answer field.

4.5.5.2 Select Continue.

4.5.5.3 Click Continue – When selected, the user is directed back to the Login screen.



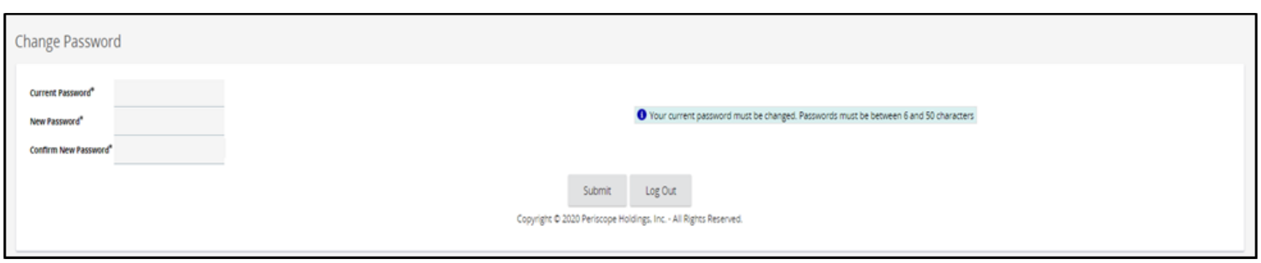
4.5.6 As the user continues the process, *NevadaEPro* emails the user their temporary password.

4.5.7 Once the user retrieves their temporary password, they can sign into the system.

4.5.7.1 Select Sign In
4.5.7.2 Enter your Login ID
4.5.7.3 Enter your Temporary Password
4.5.7.4 Click Sign In

4.5.8 The user is navigated to the change password view when the user logins for the first time with the temporary password.

4.5.9 The user will be required to enter their current password, a new password and confirm the new password.



4.5.9.1 Submit – When selected, the user's password is updated and the user is navigated to the next security view, if enabled, or to their home view.

4.5.9.2 Log Out – When selected, the user is navigated to the login view.

4.5.10 If you have issues with logging into *NevadaEPro*, contact the Purchasing Division:

Email:	purchasinghelpdesk@admin.nv.gov
Phone:	775-684-0170

5. NAVIGATING THE HOMEPAGE

5.1 USER FUNCTIONAL ASSISTANCE/SUPPORT

For assistance using *NevadaEPro* please reach out to your agency's designed Purchasing Officer at:

http://purchasing.nv.gov/contact/Who_is_my_Purchasing_Officer/

5.2 GENERAL

5.2.1 The Homepage gives users access to*:*

5.2.1.1 Create new documents;
5.2.1.2 Search for existing documents;
5.2.1.3 Update their user profile;
5.2.1.4 Create and view alerts; and
5.2.1.5 Other *NevadaEPro* features.

5.2.2 The Homepage presents recently viewed documents that the user has accessed in the past 30 days.

5.2.3 The Homepage also presents the latest news items or updates regarding *NevadaEPro*.

5.2.4 The 'Header Bar' (horizontal top screen) and the 'Navigation Bar' (vertically on the left side of the screen) provide links to important functions.

5.3 HOMEPAGE

5.3.1 There are two (2) icons that direct users immediately back to the Homepage noted below:

5.3.1.1 The Nevada Seal; and
5.3.1.2 The Speedometer Dial Icon.

5.3.2 Users should always save any changes on documents before returning to the Homepage, otherwise work may be lost.

5.4 SYSTEM CLOCK

5.4.1 The system clock is important for users who work on bid solicitations.

5.4.2 The bid available date (date and time the bid is available online) and the bid opening date (date and time by which quotes are due) are synced with the system clock which is located at the bottom of the Homepage.

5.5 ORGANIZATION ACCESS

5.5.1 Users may have access to more than one (1) organization.

5.5.2 Users should confirm which organization they are in when logging into *NevadaEPro*.

5.5.3 Documents created in one (1) organization cannot be edited or moved to another organization.

5.5.4 Users may need to change organizations before creating new documents or searching for existing documents.

Step	Change Organization Access Process Steps
1	Click the arrows next to the organization name – A popup window displays all the organizations that the user is authorized to access.
2	Enter the search criteria in search fields – Users can search by entering the search criteria or by leaving search criteria blank to return all organizations that the user is authorized to access.
3	Click 'Find It'.
4	Select the 'Organization'.
5	Click 'Select' a) Once user clicks 'Select', the new organization will be displayed. b) Users can click 'Close Window' to exit without changing the organization.

5.6 USER ACCOUNT

The 'Account Icon' contains the user's role and account information. It also allows users to logout.

5.7 USER ROLE

5.7.1 Roles determine which documents users can create, edit and/or act on in *NevadaEPro.*

5.7.2 Users may have more than one (1) role in *NevadaEPro* if the user performs multiple functions.

5.7.3 Users should confirm which role they are currently in when logging into *NevadaEPro*.

5.7.4 Users may need to change roles before creating new documents and/or acting on existing documents to ensure access is available to perform those functions.

Step	User Role Process Steps
1	Click to access the dropdown menu
2	The current role displayed below the user name. – Additional roles display if users have more than one (1) role.
3	Click a 'Role' – Once a user has selected another role; the user has access to create documents within that role's function.

5.8 MY ACCOUNT

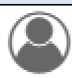
'My Account' allows users to update personal information (e.g., name, email, phone number, password, etc.), set proxy users (approvers only) and set user defaults (e.g., default dashboard, login question and answer).

Step	My Account Process Steps
1	Click .
2	Click 'My Account' – *NevadaEPro* displays the 'My Account Information' page.
3	Click 'Edit'.
4	Update Information – All information on the 'My Account Information' screen can be updated. a) Proxy User is another user (typically in the user's department) whom a user may designate to approve documents on their behalf. b) The Proxy User does not inherit another user's other system roles or privileges. c) Typically, Proxy Users are established when an individual is away from the office for an extended period of time.

Step	My Account Process Steps
5	Enter ‘Current Password’.
6	Click ‘Save & Exit’.

5.9 LOGOUT

Users should always logout of *NevadaEPro* to prevent unauthorized use.

Step	Logout Process Steps
1	Click  .
2	Select ‘Logout’ - Users will be logged out of *NevadaEPro*. Once logged out, users can click ‘Log In’ to sign back into *NevadaEPro’*.

5.10 SYSTEM HELP

The ‘Help Icon’ contains a dropdown menu that includes the version and build information of *NevadaEPro*, the *NevadaEPro* User Manual, a link to customer service, and a link to browse the NIGP Codes.

Step	System Help Process Steps
1	Click the ‘Help Icon’ to access the dropdown menu.
2	Click ‘About BuySpeed’ – The system displays the ‘About Page’, Click ‘OK’ to return to the previous page.
User Manual	
3	Click ‘User Manual’ – A new tab opens to display the user manual.
4	Search the Manual - Users can search the manual by locating the section in the table of contents or by using Ctrl + F.
Customer Service	
5	Click ‘Customer Service’.
NIGP Code Browse	
6	Click NIGP Code Browse – *NevadaEPro* displays the Commodity Code and Service Codes search window.
7	Enter the desired Search Option: a) NIGP Class; b) Class Item; or c) Keyword.
8	Click ‘Search’ – The results display as a five (5) digit NIGP Class and Class Item Code.

Step	System Help Process Steps
9	View results to make sure you have selected the correct NIGP Code(s).

5.11 ALERTS

5.11.1 The alerts provide access to events, reminders and system messages.

5.11.2 Alerts are notifications for users to work on a document or to inform them an action has been taken on a document.

5.11.3 Events

5.11.3.1 Events are used to notify BP Users of an upcoming contract expiration date or of a contract nearing its dollar limit.

5.11.3.2 Events will show a red dot if users have new, unviewed events.

Step	Events Process Steps
1	Click the ‘Alerts Icon’.
2	Select ‘Events’ – The page displays the events for users.
3	Click on the ‘Purchase Order #’ – The page refreshes to display the ‘Summary Tab’ of the selected PO.
4	Click ‘Exit’ to return to the ‘Homepage’.

5.11.4 Reminders

5.11.4.1 Reminders are set for a specific person and provide an alert to take actions on specific documents.

5.11.4.2 The number next to reminders shows the total count of reminders assigned to the user.

Step	Reminders Process Steps
1	Click the ‘Alerts Icon’.
2	Select ‘Reminders’: a) The ‘My Reminders’ page displays. b) The ‘My Reminders’ page displays tabs by document type (PO, requisition, bid, quote, invoice). c) The number represents the reminders for each document category.

Step	Reminders Process Steps
3	Click on ‘Document Type Tab’ – Select the desired document tab (PO, requisition, bid, quote, invoice).
4	Identify the Reminder: a) Review the comment and complete the action associated with the reminder. b) Click the document # to review the document.
5	Enter Date Completed – When the reminder is completed, users can enter the date in the ‘Date Completed Field’.
6	Click ‘Save & Exit’ – Upon entering a ‘Date Completed’, the reminder is removed from the user’s ‘My Reminder List’.

5.11.5 System Messages

5.11.5.1 The System Messages display the user’s documents that contain warnings or errors, organized by document type.

5.11.5.2 Users can view documents based on the current organization, department, and location privileges.

5.11.5.3 If granted privilege, users can delete system messages from documents.

Step	System Messages Process Steps
1	Click the ‘Alerts Icon’.
2	Select ‘System Messages: a) The page displays document types that contain warnings or errors. b) The documents are organized by document type. c) Users can filter system messages by documents that contain errors, warnings, documents that are in progress, or all system messages.
3	If granted access, select the document under the ‘Select’ column to clear messages. Users can select all documents for a document type to clear all messages.
4	Click ‘Clear Messages’ – Click ‘Clear All Messages’ to clear all of the appropriate messages.

5.12 NEWS

On the Homepage the ‘News Section’ contains notices the internal or organization administrator has posted.

Step	News Process Steps
1	Click the ‘News Item’ hyperlink.
2	View News Item information: a) *NevadaEPro* displays the News Details page. b) If available, users can click the ‘Link Hyperlink’ for additional details. c) Click ‘Exit’ to return to the Homepage.

5.13 NEW DOCUMENTS

5.13.1 The ‘Plus (+) Icon’ allows users to create new documents. The plus sign is located on the header bar next to the State seal.

5.13.2 The user’s role and privileges determine the documents available from the dropdown list.

Step	New Document Process Steps
1	Click the ‘Plus (+) Icon’.
2	Select the document to create from the dropdown list.
3	The new document will display.

5.14 EXISTING DOCUMENTS

5.14.1 There are several ways for functional users (e.g., DA, BP, and AP) to locate documents in *NevadaEPro*. These include use of:

5.14.1.1 Recent documents function on the user's Homepage
5.14.1.2 Left navigation bar
5.14.1.3 Actionable status boxes
5.14.1.4 Central search functionality
5.14.1.5 Advanced search functionality

5.14.2 Recent Documents

The ‘Recent Documents Box’ saves documents from the last 30 days, and users can view the document when they click the ‘View More Link’.

Step	Recent Document Process Steps
1	View Documents in ‘Recent Documents Box’ – Users will be able to see the top five (5) viewed documents from the last 30 days.

Step	Recent Document Process Steps
2	Click ‘View More’ – Users can view all documents from the last 30 days.

5.14.3 Actionable Status Boxes

5.14.3.1 The six (6) colored boxes on the Homepage change based on the user's role and display the number of documents for each status that requires the user's attention and/or action.

5.14.3.2 These boxes highlight the status of documents that are most important to users based on their role.

Step	Actionable Status Boxes Process Steps
1	Click the ‘Actionable Box’ – *NevadaEPro* displays document(s) by status based on the box selected.
2	To locate a document that was not created by the user, change the toggle switch in the top right corner to change from ‘View Mine’ to ‘View All’
3	View the list of documents and click on a document number.
4	Take the appropriate action on the document.

5.14.4 Left Navigation

5.14.4.1 The left navigation bar provides access to documents by type (e.g., requisitions, POs, contracts, etc.).

5.14.4.2 In addition, the functionality easily permits users to view their own document or all documents that they are permitted to view in *NevadaEPro* based on user privileges.

Step	Left Navigation Process Steps
1	Click the ‘Document Type’ – The red dot indicates users have a document in at least one (1) of the statuses.
2	Locate document based on listings and status: a) The resulting lists of documents are organized in tabs by status. b) If users do not know the status of the document, an ‘Advanced Search’ is recommended.
3	Click on the document number or another tab: a) The resulting lists of documents are organized in tabs by status. b) Otherwise, users may access documents in other statuses by clicking on the appropriate tab.

Step	Left Navigation Process Steps
4	Use the 'View Mine/View All' Slide Feature: a) The list of documents returned for most users are those on which the user is typically the document originator (e.g., the Requisitioner, Buyer or Accounts Payable User). b) If users are attempting to locate another user's documents through this function, it is recommended to use the 'Slide Feature' to 'View All' documents. This feature will return a more extensive list of documents based on the user's access privileges.

5.14.5 Central Search Bar

5.14.5.1 The 'Central Search Bar' allows users to perform a quick search for documents, vendors, and items.

5.14.5.2 It is most commonly used to search for items on contracts or catalogs (e.g., searching for the office supplies contract).

5.14.5.3 Refer to ***Section 23.2, Catalog Search Page.***

Step	Central Search Bar Process Steps
1	Enter document information – Users can enter document information such as the document number or a keyword to locate the specific document or vendor.
2	Select desired option from the dropdown list.
3	Click the 'Magnifying Glass Icon' for results.
4	View results: a) The page displays the results to the user. b) Click on the document # or 'Vendor ID' to view the document or the vendor. c) Once the results have been returned, users may perform a more detailed search using the 'Advanced Search' functionality, if needed.

5.14.6 Advanced Search

5.14.6.1 The Advanced Search can be used to search for documents, attachments, and vendors with specific search criteria.

5.14.6.2 Since a range of criteria may be used to limit the results (e.g., description, department, location, etc.), using this search functionality provides more precise results.

5.14.6.3 The criteria entered by users can act as 'ANY' criteria or 'ALL' criteria, to switch the 'ALL' criteria select the toggle in the top right corner. If a user enters a description and a location with 'ALL' selected, the results will only return documents that meet both criteria. If 'ANY' is selected, the results will return all documents that any one the search criteria entered.

Step	Advanced Search Process Steps
1	Clicked 'Advanced'.
2	Select the 'Document Type' from the dropdown list.
3	Enter criteria in the appropriate search fields. The search fields will change depending on the document type.
4	Click 'Search' to retrieve all documents of that type. a) The page will refresh to display the results. b) Click 'Clear' to erase the entered date in the search fields.

5.15 REPORTING AND SUPPORT FUNCTIONS

5.15.1 The reporting and support functions settings provides users with access to several reporting, data analysis and support tools.

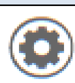
5.15.2 Click on the 'Gear Icon' to access the settings dropdown menu. The menu varies for each user depending on access privileges.

5.15.3 User Dashboard

5.15.3.1 The 'User Dashboard' link provides a view of the configured dashboards that are enabled based on the user's role.

5.15.3.2 Users can utilize the dashboard for snapshots of data from *NevadaEPro*.

5.15.3.3 The dashboards are useful to users in managing day-to-day operations, analyzing performance metrics, and providing insight into procurement/purchasing performance (e.g., contract spend).

Step	User Dashboard Process Steps
1	Click 
2	Select 'User Dashboard' – If enabled for the user, the page will refresh to display the configured dashboard for that user role.
3	Click 'Exit'.

5.15.4 Reports

The ‘Reports Link’ directs users to the list of standard administrative reports, by document type, if configured for the specific user.

Step	Reports Process Steps
1	Click .
2	Click the ‘Report’ Link - The page will refresh to display those reports enabled for the user. Once a report is rendered, it may be downloaded by users in various formats.

5.15.5 Vendor Notification

5.15.5.1 The ‘Vendor Notification Link’ directs the user to the ‘Vendor Lookup’ page.

5.15.5.2 Users can search for vendors with specific search criteria.

5.15.5.3 Once the list of vendors is returned, users may download mailing labels or send a bulk email to all vendors selected.

5.15.5.4 This functionality is typically used when users need to notify all or a group of vendors of a certain topic such as a new required ‘Vendor Category’.

5.15.5.5 ‘News Items’ for vendors may also be used to reinforce this messaging.

Step	Vendor Notification Process Steps
1	Click
2	Select ‘Vendor Notification’ – The page will refresh to display the ‘Vendor Search’ page.
3	Enter criteria in the appropriate search fields.
4	Click ‘Find It’: a) The results are displayed. b) Click the ‘Vendor ID’ to view the vendor’s profile. c) Users can click ‘Clear’ to erase the entered data. d) Click ‘Find It’ to initiate the search.

5.15.6 Form Builder

5.15.6.1 If users have form builder administrator rights, the user is able to access form builder from the 'Settings' section. This option will only display to authorized users for form builder.

5.15.6.2 Form builder enables users to create online forms for other users to view and/or edit.

5.15.6.3 For many users, form builder is used to access existing forms in *NevadaEPro*.

Step	Form Builder Process Steps
1	Click
2	Select 'Form Builder' – The page will refresh to display the 'Manage Forms' page.
3	Enter 'Search Criteria', as appropriate.
4	Click 'Find It': a) The search will return a list of forms, both published and unpublished, based on the search criteria. b) If no criteria are entered, all forms will be shown in the list.

5.15.7 Dashboard Reporting

The 'Dashboard Reporting Link' directs users to the configured dashboards for that user and role in the business intelligence (BI) tool.

Step	Dashboard Reporting Process Steps
1	Click .
2	Select 'Dashboard Reporting' – If enabled for the user, the page will refresh to display the configured dashboard for that user role from the BI tool.

5.15.8 Ad Hoc Reporting

The 'Ad Hoc Reporting Link' directs users to the BI tool where users can create and save new reports.

Step	Ad Hoc Reporting Process Steps
1	Click
2	Select ‘Ad Hoc Reporting’ and users will be redirected to the BI tool.

5.15.9 G2B Punchout

If enabled for users, the ‘G2B Punchout Link’ allows users to create a punchout order from the G2B Punchout. Refer to ***Section 24, Creating a Punchout Order.***

Step	G2B Punchout Process Steps
1	Click
2	Select ‘G2B Punchout’ and users will be redirected to the appropriate G2B punchout shopping page.

6. DOCUMENT ACTION TYPES

6.1 GENERAL

6.1.1 In addition to creating and editing documents, users may also take a number of actions on documents. For example, a user might clone an existing requisition and use it as a basis for a new requisition.

DOCUMENT ACTION TYPES			
Action	**Location**	**Impacts a Tab or the Entire Document**	**Functionality**
Save & Continue	Bottom of most screens	Tab	Saves the changes made on the screen and continues to display the current screen. Leaving the screen tab before saving will result in users losing changes they have made.
Save & Exit	Common action in new windows	Tab	Saves the changes made on the screen and returns users to previous screen.
Save & Add New	Bottom of Items Tabs	Tab	Saves new item or new changes to an item and creates a new blank item.
Reset	Bottom of some Tabs	Tab	Clears any unsaved changes from fields on the tab and leaves users on the screen.
Cancel & Exit	Bottom of most screens	Tab	Exits users from pop up window but does not save changes.
Submit for Approval	Bottom of Summary Tab	Entire Document	Submits completed document for approval. Approvals may auto-attach or user may add approvers manually. Documents cannot be modified once submitted for approval, except by an approver, who can only update NIGP and account codes in some cases.
Cancel [document]	Bottom of Summary Tab	Entire Document	Document is moved to ‘Cancelled’ status. Document will be locked for editing but may be cloned.
Clone [document]	Bottom of Summary Tab	Entire Document	A copy of the document is created with a new document number. The cloned document is in ‘In Progress’ status and may be edited.

6.1.2 Finally, many documents in *NevadaEPro* will be reviewed and approved/disapproved by other users based on automated ‘Approval Paths’. The actions these users may take on documents and their implications are covered in ***Section 7.2, Document Abbreviation, Name and Status Definitions***.

7. DOCUMENT STATUS TYPES

7.1 GENERAL

7.1.1 Certain actions change a document's status; e.g., when a BP User clicks the ‘Send’ button to transmit a PO to a vendor, the PO moves from ‘Ready to Send’ status to ‘Sent’ status.

7.1.2 Some status changes can create an interface transaction to the State’s financial system.

7.1.3 Document statuses are also used to organize the display of documents in *NevadaEPro*. On the Homepage, actionable status boxes show documents by status that may require action from users and the left navigation bar presents all documents in any status.

7.2 DOCUMENT ABBREVIATION, NAME AND STATUS DEFINITION

DOCUMENT ABBREVIATION, STATUS AND DEFINITION	
Status	**Status Definition**
REQ - Requisition	
In Progress	Initial status when the originating user is drafting the document; most fields are editable by users.
Ready for Approval	Status after the originator has submitted the document, when the current approver can approve, disapprove, or cancel the document; all fields are locked except accounting and NIGP codes for current approver only.
Returned	Status after an approver has disapproved the document, when the originating user can reopen the document, moving it back to ‘In Progress’ status (for editing).
Ready for Purchasing	Status after the final approver has approved the requisition, and a BP User can convert it to a bid or PO; all fields are locked.
Gone to PO	Status after a BP User has converted the requisition or bid (from original requisition) to a PO; all fields are locked.
Gone to Bid	Status after a BP User has converted the requisition to a bid; all fields are locked.
RFX – Bid Solicitation	
In Progress	Initial status when the originating user is drafting the document; most fields are editable by users.
Ready for Approval	Status after the originator has submitted the document, when the current approver can approve, disapprove, or cancel the document; all fields are locked.
Returned	Status after an approver has disapproved the document, when the originating user can reopen the document, moving it back to ‘In Progress’ status (for editing).

DOCUMENT ABBREVIATION, STATUS AND DEFINITION	
Status	**Status Definition**
Ready to Send	Status after the final approver has approved the bid, and a BP User can send the bid; all fields are locked.
Sent	Status after the BP User has sent the bid; majority of fields are locked and require a bid amendment for editing.
Ready to Open	Status when the bid reaches its bid opening date; all fields are locked.
Opened	Status after the BP User has opened the bid; all fields are locked on bid; 'Bid Tab' may be edited.
Evaluated	Status when the BP User has submitted the bid for approval; all fields are locked on the bid and 'Bid Tab'.
Approved	Status after the final approver has approved the 'Bid Tab'; all fields are locked on the bid and 'Bid Tab'.
Gone to PO	Status after the bid has been awarded and the BP User has converted the bid to a PO; all fields are locked on the bid and 'Bid Tab'.
CON - Contracts	
In Progress	Initial status when the originating user is drafting the document; most fields are editable by users.
Ready for Approval	Status after the originator has submitted the document, when the current approver can approve, disapprove, or cancel the document; all fields are locked.
Returned	Status after an approver has disapproved the document, when the originating user can reopen the document, moving it back to 'In Progress' status (for editing).
Ready to Send	Status after the final approver has approved the document and a BP User can send the document; all fields are locked.
Sent	Status after a BP User has sent the document; most fields are locked and require a change order for editing.
PO – Purchase Orders	
In Progress	Initial status when the originating user is drafting the document; most fields are editable by users.
Ready for Approval	Status after the originator has submitted the document, when the current approver can approve, disapprove, or cancel the document; all fields are locked.
Returned	Status after an approver has disapproved the document, when the originating user can reopen the document, moving it back to 'In Progress' status (for editing).
Ready to Send	Status after the final approver has approved the document; all fields are locked.

DOCUMENT ABBREVIATION, STATUS AND DEFINITION	
Status	**Status Definition**
Pending Receipt	Status when an invoice has been created against a PO, however, a receipt has not been created; most fields are locked and require a change order for editing.
Sent	Status after a BP User has sent the PO to the vendor; most fields are locked and require a change order for editing.
Partial Receipt	Status when a user creates a receipt to indicate that item(s) were partially received; most fields are locked and require a change order for editing.
Complete Receipt	Status when a user creates a receipt to indicate all item(s) were completely received; all fields are locked.
Closed	Status of a document when a user closes the PO; all fields are locked.
REC - Receipts	
In Progress	Initial status when the originating user is drafting the document; most fields are editable.
Ready for Approval	Status after the originator has submitted the document, when the current approver can approve, disapprove, or cancel the document; all fields are locked.
Returned	Status after an approver has disapproved the document, when the originating user can reopen the document, moving it back to 'In Progress' status (for editing).
Approved for Invoice	Status after the final approver has approved the document; all fields are locked.
CM – Credit Memo	
Credit Memo	***Note: NevadaEPro is currently not configured for this functionality.***
INV - Invoice	
In Progress	Initial status when the originating user is drafting the document; most fields are editable.
Ready for Approval	Status after the originator has submitted the document, when the current approver can approve, disapprove, or cancel the document; all fields are locked.
Returned	Status after an approver has disapproved the document, when the originating user can reopen the document, moving it back to 'In Progress' status (for editing).
Pending Receipt	Status of an invoice that does not yet have a receipt for the PO; all fields are locked.
Approved for Payment	Status after the final approver has approved the document; all fields are locked.

DOCUMENT ABBREVIATION, STATUS AND DEFINITION	
Status	**Status Definition**
Paid	Status when the invoice has reached its payment date; all fields are locked except payment information (check number, amount paid, payment date, etc.) that may be populated via an interface with the State's financial system.

8. DOCUMENT TYPE AND SUB TYPE FUNCTIONALITY

DOCUMENT TYPE AND SUBTYPE FUNCTIONALITY	
Document Subtype	**Functionality**
Requisition	
Open Market	Off-contract purchases, including informal price quotes. Requests for new goods or services that must go through a formal procurement process.
Release (Direct or Standard)	On-contract purchases that are available on a MBPO only. Release type is determined on a Master Blanket.
RPA Release	On-contract purchases that occur outside of *NevadaEPro* but are part of a MBPO only. RPA release is allowed based on the Master Blanket.
Punchout Release	On-contract purchase for a contract that includes a punchout to the vendor's catalog.
RPA	Request payment for a purchase that occurred outside of *NevadaEPro*.
Demand	Collect estimated quantity of goods needed from other departments and organizations in *NevadaEPro* to aggregate and formally procure.
Direct Open Market	Allows requestors or DA Users to buy goods or services directly from a vendor without going through a buyer.
Inventory	***Note: NevadaEPro is currently not configurated for this functionality.***
Bid	
Open Market	Formal procurement of a one-time project, good or service.
Blanket	Formal procurement that will result in a term agreement.
Amendment	Any change to an open formal procurement.
Quote	
N/A	Electronic response to any bid.

DOCUMENT TYPE AND SUBTYPE FUNCTIONALITY	
Document Subtype	**Functionality**
Purchase Order	
Open Market	Any one (1) time purchase that will be sent to a vendor to fulfill.
Master Blanket	Any term agreement that will be sent to a vendor.
Release Purchase Order	PO for on-contract goods or services that will be sent to a vendor to fulfill.
Contract	No longer used.
Change Order	Any change to any type of PO after it is sent to the vendor for fulfillment.
Receipt	
N/A	Goods or services have been received by the requestor and the second part of the three-way-match.
Invoice	
N/A	The third part of the three-way-match and approval to pay the vendor.
Credit Memo	
N/A	***Note: NevadaEPro is currently not configured for this functionality.***
Vendor Performance	
N/A	***Note: NevadaEPro is currently not configured for this functionality.***

9. COMMON TABS

9.1 GENERAL INFORMATION

9.1.1 Within *NevadaEPro*, a number of tabs are the same across documents (e.g., requisitions and POs).

9.1.2 ***Section 10 through Section 22*** provide guidance on the effective use of common tabs across document types.

9.1.3 In some cases, the action buttons at the bottom of the screen will be slightly different; however, they function very similarly across documents.

10. ITEMS TAB/GENERAL SUBTAB - COMMON TABS

10.1 GENERAL

10.1.1 The 'Items Tab/General Subtab' captures information on the goods or services that a user is requesting.

10.1.2 The organization, number of items and related detailed information on the 'Items Tab' may vary greatly depending on the type of document and how it is being used.

10.2 CREATING ITEMS

10.2.1 The following table provides basic guidance on creating items.

CREATING ITEMS – COMMON TABS	
Document Subtype	**Functionality**
Requisition	
Open Market for formal procurement	Items will transfer to bid document. Minimal number of items; high-level descriptions. Note: Buyer may add more detail on the bid.
Open Market for informal quotes	Vendor will provide price quote for items on requisition
Release or RPA Release	Items will populate from existing MBPO (catalog). Catalog Master Blanket: No additional detail needed. Category Master Blanket: Add detail to item description to record exact product or service purchased.
RPA	Items will transfer to a PO and invoice.
Punchouts	Items will come from existing MBPO (contract items)

CREATING ITEMS – COMMON TABS	
Document Subtype	**Functionality**
Bids	
All Types	Items will be viewed and priced by vendors on quotes. Provide detailed descriptions to be procured or high-level, if pricing sheet is used as an attachment).
Purchase Orders	
Open Market	Provide detailed descriptions of items to be purchased that will be used by vendors for fulfillment of order
Master Blanket	Items will be used by vendors for fulfillment and by purchasing users to develop orders.
Punchout MBPO	Generic item (actual items on vendor punchout site). Items and NIGP code detail needed for spend tracking.

10.2.2 Users may add items using one (1) of three (3) methods:

10.2.2.1 Searching for existing items; or
10.2.2.2 Adding new items from scratch; or
10.2.2.3 Uploading items from a spreadsheet.

10.2.3 Users can also delete items.

10.2.4 The steps outlined below differ slightly depending on the document type (requisition, bid or PO) or sub-document type (Open Market, Release, etc.).

10.3 SEARCH ITEMS

The ‘Search Items’ method is commonly used for adding items that are frequently procured or purchased (e.g., the item is already in *NevadaEPro*).

Step	Search Items Process Steps
1	Click ‘Search Items’.
2	Enter information in ‘Search Fields’.
3	Click ‘Find It’.
4	Select the item and enter the quantity – The majority of the data related to the item(s) will be pre-populated onto the ‘Items Tab’ based on the information stored in *NevadaEPro*.
5	Click ‘Save & Exit’.
6	Update the item as needed – Users can edit any field on the item if needed.
7	Click ‘Save & Exit’.

10.4 ADD ITEMS

10.4.1 The 'Add Items' method is commonly used when users are procuring or purchasing an item for the first time.

Step	Add Items Process Steps
1	Complete required fields – refer to ***Section 10.4.2, Required Field Descriptions – Add Items:*** a) Users must complete all required fields before saving the new document. b) Each item may only have one (1) NIGP Class ID and Class Item ID associated with it. c) If an item has two (2) or more NIGP codes associated with it, users should consider splitting it into multiple items.
2	Click 'Save & Continue'.
3	Complete Optional Fields, as preferred (refer to ***Section 10.4.3, Optional Field Descriptions – Add Items***.
4	Click 'Save & Exit'.
5	Review and update items, if applicable – Users may review all items entered and update by clicking the 'Item #'.

10.4.2 Required Field Descriptions – Add Items

REQUIRED FIELD DESCRIPTIONS – ADD ITEMS		
Field Name	**Field Description**	**Functionality**
Description	Description of line item	Searchable in internal and external searches, if applicable. Descriptions are often structured 'noun, description adjectives', e.g., green beans, 8oz can, French Style.
NIGP Class ID	Three (3) digit Class Code associated with the item	Searchable in internal and external searches. NIGP codes are used to track spend and identify strategic sourcing opportunities.
NIGP Class Item ID	Two (2) digit Class Item ID associated with item	Searchable in internal and external searches. Additional detail to NIGP Class ID.
Quantity	Quantity of item being requested	Visible externally and to vendors. For unknown quantities, enter '1'.

10.4.3 Optional Field Descriptions – Add Items

OPTIONAL FIELD DESCRIPTIONS – ADD ITEMS		
Field Name	**Field Description**	**Functionality**
Unit Cost	Estimated price of each item	Not shown to vendors; used to calculate overall estimated cost and configured to trigger approval paths
UOM	Unit of Measure for item	Visible externally and to vendors; cannot be updated by vendor. Used to identify the unit of measure; e.g., feet, yard, hour, etc.
Discount %	Discount % for item	Discount % will change the total cost of item
Total Discount Amt.	Total Discount dollars based on Discount %	Calculated automatically by *NevadaEPro* based on discount %; user can edit
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***	
Manufacturer	Manufacturer for item	Informational, vendor cannot edit on quote. Enter appropriate information, if known.
Brand	Brand of item	Informational, vendor cannot edit on quote. Enter appropriate information, if known.
Model	Model of item	Informational, vendor cannot edit on quote. Enter appropriate information, if known.
Make	Make of item	Informational, vendor cannot edit on quote. Enter appropriate information, if known.
Packaging	Packaging of item	Informational, vendor cannot edit on quote. Enter appropriate information, if known.

10.5 DELETE ITEMS

Step	Delete Items Process Steps
1	Users have the option to delete items. Select ‘Item’ from ‘Delete Column’ – Select ‘Delete All’ to delete all items from the document.
2	Click ‘Save & Continue’.

11. ITEMS TAB/VENDOR SUBTAB - COMMON TABS

11.1 GENERAL

11.1.1 The 'Items Tab/Vendor Subtab' allows users to recommended vendors for individual items.

11.1.2 Users must first add all vendors to the 'Vendor Tab', then select a recommended vendor for each item.

11.1.3 If users only need to recommend one (1) vendor use the 'Vendor Tab'.

Step	Items Tab/Vendor Subtab Process Steps
1	Select the 'Recommended Vendor' for the line item – Users have the option to select a 'Recommended Vendor' and apply that vendor to the items selected by the user.
2	Click 'Apply to Selected' to apply the vendor to the selected item(s) or 'Apply to All Items' to apply the vendor to all items listed.
3	Click 'Save & Continue'.

12. ITEMS TAB/ADDRESS SUBTAB - COMMON TABS

12.1 GENERAL

12.1.1 The 'Items Tab/Address Subtab' captures 'Ship-To' and 'Bill-To' addresses for individual items (when different items have different addresses, typically for shipping).

12.1.2 If all items on the document share the same 'Ship-To' and 'Bill-To' addresses, the 'Address Tab' should be used.

12.1.3 Add Addresses to an Individual Item

When each item requires a different 'Ship-To' and/or 'Bill-To' address, users should use the 'Magnifying Glass Icon' next to the item being updated.

Step	Items Tab/Address Subtab Process Steps
1	Click the 'Magnifying Glass Icon' next to the item and a new window will open.
2	Enter 'Search Criteria' and click 'Find It' - To return all addresses, do not enter any data and click 'Find It'.
3	Select the 'Address' and click 'Select' at the bottom of the screen and the selected address will be populated on the page.

12.2 ADD ADDRESSES TO SELECTED ITEMS

When there are several items that require the same 'Ship-To' and/or 'Bill-To' address, use the 'Magnifying Glass Icon' at the bottom of the screen to apply addresses to selected items.

Step	Add Addresses to Selected Items Process Steps
1	Select the items.
2	Click the 'Magnifying Glass Icon' at the bottom of the screen.
3	Enter data in fields and click 'Find It'. To return all addresses, do not enter any data and click 'Find It'.
4	Select the address and click 'Select' at the bottom of the screen. The address will display on the previous screen once selected.
5	Click 'Apply to Selected': a) Click 'Apply to All Items' or 'Reset Selected to Header'. b) 'Reset Selected to Header' will update the selected items to the address listed on the 'Header Address Tab'.

13. ITEMS TAB/ACCOUNTING SUBTAB - COMMON TABS

13.1 GENERAL

13.1.1 The 'Items Tab/Accounting Subtab' captures the funding source(s) for individual items on the document.

13.1.2 If all items share the same funding source, the 'Accounting Tab' should be used.

13.2 ADD ACCOUNTING TO AN INDIVIDUAL ITEM

Step	Add Accounting to an Individual Item Process Steps
1	Select the 'Item #'.
2	Enter the Account Segments: a) Depending on how accounting is configured for the organization, users may manually enter the account segment or search for account codes using the 'Magnifying Glass Icon'. b) The 'Magnifying Glass Icon' opens a new window to allow users to search and select available account codes.
3	Enter the Percent or Dollar(s) for the allocation to the account code: a) Users have the option to enter the dollar amount for allocation to the account code. b) If a dollar amount is entered, users must save based on dollars in the next step.

Step	Add Accounting to an Individual Item Process Steps
4	Select ‘Exit’ from the ‘Go To’ after ‘Save’ dropdown – Users may also select ‘Current Page’ to add more account codes to this item, or the next or previous item to update accounting for those items.
5	Click ‘Save Based on Percentages or Dollars’ - Click ‘Reset’ to erase the account codes on the tab or click ‘Cancel & Exit’ to return to the previous screen.
6	Review Account Codes for an Item: a) Users are able to view the account code for the selected item. b) Users can apply the account code to other items by selecting the item and clicking ‘Apply to Selected’.

13.3 COPY ACCOUNTING TO SELECTED ITEMS

13.3.1 Once users have added accounting to one (1) item, they can copy the accounting to selected items.

13.3.2 Users may also continue updating each item one (1) at a time.

Step	Copy Accounting to Selected Items Process Steps
1	Select ‘Items’.
2	Select the item from ‘Copy Accounting from Item #’.
3	Click ‘Apply to Selected’ – Click ‘Apply to All Items’ to update every item on the document.

13.4 DELETE ACCOUNTING FOR SELECTED ITEMS

Users can delete accounting for selected items or for all items on the document. This option is useful when there are several items that need to be edited.

Step	Delete Accounting for Selected Items Process Steps
1	Select the item from the ‘Select Column’ – Choose ‘Select All’ to select all the items on the document.
2	Click ‘Delete Selected’: a) The accounting will be deleted for the selected items. b) Click ‘Delete All’ to delete the accounting for all items listed on the document.

14. ITEMS TAB/ATTACHMENTS SUBTAB - COMMON TABS

14.1 GENERAL

14.1.1 The ‘Items Tab/Attachments Subtab’ captures any supporting documentation regarding an individual item that may be helpful to other users, such as approvers, auditors, or vendors who have access to the document.

14.1.2 If an attachment applies to all items on the document (e.g., an RFP document or General Terms & Conditions), the ‘Attachments Tab’ should be used rather than the ‘Items Tab/Attachment Subtab’.

14.2 ADD ATTACHMENTS TO AN INDIVIDUAL ITEM

Step	Add Attachments to an Individual Item Process Steps
1	Click the number below ‘Item #’.
2	Click ‘Add File’.
3	Click ‘Choose File’ to upload a file from the user’s computer or click ‘Search File’ to add a file that has been uploaded on another document.
4	Select the file to upload.
5	Complete the fields – Users may update the name for the attachment and enter a description that will display to the vendor.
6	Click ‘Save & Exit’ to cancel any changes and to return to the previous screen or click ‘Save & Continue’ to save the current attachment and upload a new attachment.
7	Update visibility and order, if applicable: a) Some documents in *NevadaEPro* allow users to show attachments to the vendor, which permits vendors to download the attachments once the document is available to them. b) Users may uncheck the ‘Show Vendor’ box, if the file is intended for internal purposes only. c) The attachment order may be updated if there are multiple attachments and users prefer the attachments to display in a specific order.
8	Click ‘Save & Exit’ or click ‘Save & Continue’ to remain on the screen and add another file, by clicking ‘Add File’.
9	View attachments by item – Users are able to view the attachment for the selected item by clicking the ‘Plus (+)’ sign next to the ‘Item #’.

14.3 DELETE ATTACHMENTS FOR AN INDIVIDUAL ITEM

Step	Delete Attachments for an Individual Item Process Steps
1	Click the 'Item #' - Users will see the files associated to that item.
2	Select the 'File' under the 'Delete Column'.
3	Click 'Save & Continue' – Click 'Save & Exit' to save and return to the previous page or click 'Cancel & Exit' to undo the delete action and return to the previous page.

15. ITEMS TAB/NOTES SUBTAB - COMMON TABS

15.1 GENERAL

15.1.1 The 'Items Tab/Notes Subtab' captures internal notes regarding an individual item that may be reviewed by an approver or user in the future.

15.1.2 If a note applies to all items on the document, the 'Notes Tab' should be used.

15.2 ADD NOTES TO AN INDIVIDUAL ITEM

Step	Add Notes to an Individual Item Process Steps
1	Click the 'Item #'.
2	Enter note information in the box.
3	Click 'Save & Exit': a) Click 'Reset' to erase all information entered in the box, prior to clicking 'Save & Continue'. b) Any note may be deleted after being saved.
4	View Notes by Item: a) Users are able to view the note(s) for the selected item by clicking the 'Plus (+) Sign' next to the 'Item #'. b) To edit or add more notes to an item, click the 'Item #'.

15.3 DELETE NOTES FOR AN INDIVIDUAL ITEM

Users can delete a single note for the item or delete all notes associated to an individual item.

Step	Delete Notes for an Individual Item Process Steps
1	Click the 'Item #'.

Step	Delete Notes for an Individual Item Process Steps
2	Select the Note from the 'Delete Column' – Select all notes for the item by selecting 'Delete All'.
3	Click 'Save & Continue': a) Click 'Save & Exit' to return to the previous page. b) Click 'Reset' to undo the delete action or click 'Cancel' to return to the previous page.

16. ADDRESS TAB – COMMON TABS

16.1 GENERAL

16.1.1 The 'Address Tab' captures the 'Ship-To' and 'Bill-To' address that applies to all items listed on the document.

16.1.2 Users may also capture 'Ship-To' and 'Bill-To' addresses for individual items on the 'Items Tab/Address Subtab'.

Step	Address Tab Process Steps
1	Click the 'Magnifying Glass Icon' and a new window will open.
2	Enter 'Search Criteria' and click 'Find It'. To return all available addresses, do not enter any search criteria before clicking 'Find It'.
3	Select the 'Address' and click 'Select' at the bottom of the screen and the 'Ship-To' address will be populated on the page.
4	Click 'Apply Ship-To' to 'All Items'.
5	Click 'Save & Continue' – Follow the same steps to capture a 'Bill-To' address for all items.

17. ACCOUNTING TAB – COMMON TABS

17.1 GENERAL

17.1.1 The 'Accounting Tab' captures the proposed funding source(s) applicable to all items listed on the document.

17.1.2 Users may also capture the funding source(s) for individual items on the 'Items Tab/Accounting Subtab'.

17.1.3 Users may search for account codes, manually enter account codes or a combination.

17.1.4 It is recommended that users save based on percentages first and then save based on dollars, if applicable

17.2 SEARCH FOR AND MANUALLY UPDATE ACCOUNT CODES

Step	Search for and Manually Update Account Codes Process Steps
1	Click the 'Magnifying Glass Icon' and a new window will open.
2	Enter Search Criteria and click 'Find It' – To return all account codes, do not enter any search criteria before clicking 'Find It'.
3	Select the 'Account Code' and click 'Select' at the bottom of the screen – Users may also type the account code if an account code is not loaded in *NevadaEPro*.
4	Manually update account segments, if applicable.
5	Enter the percentage or dollar amount – Users can allocate the account code by a percentage or dollar amount. ***Note: It is recommended to first save based on percentages and then on dollars, if applicable.***
6	Click 'Save Based on Percentages or Dollar Amount'.
7	Click 'Rebuild for All Items': a) 'Rebuild for All Items' applies the account codes entered at the 'Header Level' to all items on the document. b) If item level account code already exists, then 'Rebuild for All Items' will overwrite the existing item level accounting. c) Select 'Reset' to erase the account codes on the page.

17.3 MANUALLY ENTER ACCOUNT CODES

Step	Manually Enter Account Codes Process Steps
1	Complete Required Fields: a) Users must complete all required fields before saving the new document. b) The required fields on the 'Accounting Tab' will vary for each agency.
2	Complete Optional Fields, as preferred – The optional fields on the 'Accounting Tab' will vary for each agency.
3	Enter the Percentage or Dollar Amount – Users can allocate the account code by a percentage or dollar amount.
4	Click 'Save Based on Percentages or Dollars'.

Step	Manually Enter Account Codes Process Steps
5	Click ‘Rebuild for All Items’: a) ‘Rebuild for All Items’ applies the account codes entered at the header level to all items on the document. b) If item level account code already exists, then ‘Rebuild for All Items’ will overwrite the existing item level accounting. c) Select ‘Reset’ to erase the account codes on the page.

17.4 DELETE ACCOUNT CODES

Users can delete one (1) account string or delete all the account codes on the ‘Accounting Tab’.

Step	Delete Account Codes Process Steps
1	Select the account code from the ‘Delete Column’ – Select all the accounts by selecting ‘Delete All’.
2	Click ‘Save Based on Percentages or Dollars’ – Click ‘Reset’ to undo the delete action.

18. ROUTING TAB – COMMON TABS

18.1 GENERAL

18.1.1 The ‘Routing Tab’ captures any approval paths that automatically apply to the document or approvers that are manually added after users submit the document for approval.

18.1.2 The ‘Routing Tab’ will remain blank until users submit the document for approval.

18.1.3 As the document moves through approvers, the date and time of each approval is recorded on the ‘Routing Tab’.

19. ATTACHMENTS TAB/AGENCY SUBTAB – COMMON TABS

19.1 GENERAL

19.1.1 The ‘Attachments Tab’ captures any supporting documentation regarding the document that may be helpful to other users, such as approvers, auditors, or vendors who have access to the document.

19.1.2 A wide variety of attachments may be added to documents including:

19.1.2.1 General Terms and Conditions

19.1.2.2 Product Specifications
19.1.2.3 Project Scope Documents
19.1.2.4 Purchasing Justification Letters
19.1.2.5 Sole Source Documentation
19.1.2.6 Price quotes received from vendors via email or fax
19.1.2.7 Project-specific Terms and Conditions
19.1.2.8 RFP, RFQ and/or RFI PDF Documents
19.1.2.9 Project Drawings/Designs
19.1.2.10 Vendor Compliance Forms

19.1.3 For bid solicitations, it is recommended that the terms and conditions (or documents that contain them) be ordered at the very top of the attachments. This practice makes it easier for vendors to locate the terms and conditions when accepting them during the quote preparation process.

19.1.4 Files

19.1.4.1 Files are documents that are completed outside of *NevadaEPro*, saved and uploaded to the appropriate document.

19.1.4.2 Users may add new files, update the description, set the attachment to display to the vendor when the bid is posted, reorder the files and delete files.

19.1.4.3 Some files may automatically appear when the document is created.

19.1.5 Forms

Forms are documents that are completed electronically in *NevadaEPro* by users and saved to the document.

19.2 ADD NEW FILES

Step	Add New Files Process Steps
1	Click ‘Add File’.
2	Click ‘Choose File’ to upload a file from the user’s computer or click ‘Search File’ to add a file that has been attached on another document.
3	Select the appropriate file to be uploaded.
4	Complete the fields as appropriate – Users may update the name for the attachment and enter a description that will display to the vendor.
5	Click ‘Save & Exit’: a) ‘Click Cancel & Exit’ and the attachment will not be saved, and users will be returned to the previous screen. b) Users may also click ‘Save & Continue’ to save the current attachment and add a new attachment.

Step	Add New Files Process Steps
6	Update visibility and order, if applicable: a) Some documents allow users to show the attachment to the vendor, which allows vendors to download the attachments once the document is available. b) Users may uncheck the ‘Show Vendor Box’ if the file is intended to be for internal purposes only. c) The order of the attachments displayed may be updated if there are multiple attachments and users want the attachments to display in a specific order.
7	Click ‘Save & Continue’: a) Click ‘Cancel & Exit’ and the updates will not be saved, and users will be returned to the previous screen. b) Click ‘Save & Continue’ to remain on the screen. c) Users may also add another file by clicking ‘Add File’.

19.3 UPDATE FILE DESCRIPTION

Step	Update File Description Process Steps
1	Click ‘View Details’.
2	Update ‘Description’.
3	Click ‘Save & Exit’.

19.4 DELETE THE FILE

Step	Delete the File Process Steps
1	Select ‘Delete’ – Users may choose more than one (1) file to delete from the document.
2	Click ‘Save & Continue’.

20. ATTACHMENTS TAB/VENDOR SUBTAB – COMMON TABS

20.1 GENERAL

20.1.1 The ‘Attachments Tab/Vendor Subtab’ displays attachments the vendor uploaded.

20.1.2 On Requisitions, the ‘Attachments Tab/Vendor Subtab’ is populated when a vendor submits an informal quote.

20.1.3 On Purchase Orders, the 'Attachments Tab/Vendor Subtab' is populated when a vendor uploads a file on a Purchase Order that has been sent.

20.1.4 The 'Confidential Flag' can be updated from the 'Attachments Tab/Vendor Subtab'.

21. NOTES TAB – COMMON TABS

21.1 GENERAL

21.1.1 The 'Notes Tab' captures internal notes applicable to all items on the document.

21.1.2 Users may also capture notes regarding individual items on the 'Items Tab/Notes Subtab'.

21.2 ADD A NOTE

Step	Add A Note Process Steps
1	Enter note information in the box.
2	Click 'Save & Continue' – Click reset to erase all information entered in the box prior to clicking 'Save & Continue'.

21.3 DELETE A NOTE

Step	Delete A Note Process Steps
1	Select 'Delete'.
2	Click 'Save & Continue'.

22. REMINDERS TAB – COMMON TABS

22.1 GENERAL

22.1.1 The 'Reminders Tab' captures reminders or alerts for users, who have access to the specific documents.

Step	Reminders Tab Process Steps
1	Complete the fields – refer to ***Section 22.1.2, Reminders Tab Field Names, Field Description and Recommended Usage.***
2	Click 'Save & Continue' – Click 'Reset', the reminder will not be saved, and the screen will refresh.
3	Click 'Summary Tab' to view all reminders.

22.1.2 Reminders Tab Field Names, Field Description and Recommended Usage

To create a reminder, the user must complete the following fields.

REMINDERS TAB FIELD NAMES	
Field Name	**Functionality**
Due Date	The due date of the reminder
Comment	Free field text box – information with instructions for the reminder or assignment.
Remind Whom	User who needs to be reminded to complete an assignment
Days Prior to Remind	The number of days prior to remind the user
Send Email	Not Required. Check the box if users want *NevadaEPro* to send an email to the person who is being reminded to complete an action.

23. SEARCHING FOR CONTRACT ITEMS

23.1 GENERAL

23.1.1 *NevadaEPro* enables DA users and BP Users to create ‘Release Requisitions’ (orders) off of ‘MBPO’, and in some cases, send them directly to the vendor, bypassing BP Users.

23.1.2 The purpose of the ‘Catalog Search’ is to allow users to search for items on MBPO or contracts to prepare ‘Release Requisitions’.

23.1.3 The ‘Catalog Search’ is accessible from the ‘Homepage’.

Step	Searching for Contract Items Process Steps
1	Enter a description of the item – The ‘Catalog Search’ matches the description users enter with a number of fields on active contract, including the PO (contract) description, item description, vendor, etc.
2	Click the ‘Magnifying Glass’ – this will redirect users to the ‘Catalog Search’ page.

23.2 CATALOG SEARCH PAGE

23.2.1 The purpose of the ‘Catalog Search’ page is to display all of the results from utilizing the ‘Catalog Search’.

23.2.2 The ‘Catalog Search’ page displays the matching items, the corresponding item's contract or MBPO, and the item price by unit of measure (UOM).

23.2.3 Users can filter the results by type of item on contract, price, vendor, category and vendor programs.

23.2.4 The results from the ‘Catalog Search’ can be used to add items to a new requisition or to an existing requisition.

23.2.5 The purpose of adding to a new requisition is to allow users to create a new requisition document with the items that have been added to the cart.

23.2.6 The purpose of adding to existing requisition is to allow users to search for an existing requisition and to add the contents of the cart to that requisition.

23.2.7 Locate Items to Add to a New Requisition

Step	Searching for Contract Items Process Steps
1	Locate the desired item.
2	Enter the desired quantity in the field below the item price.

Step	Searching for Contract Items Process Steps
3	Click ‘Add to Cart’: a) The top right ‘Cart Icon’ updates the displayed value from zero (0) to the sum of the quantity users enter. b) The items selected stay in the ‘Cart’ if a new search is performed.
4	Click the ‘Cart Icon’: a) This action opens a new window to display the items within the ‘Cart’, the quality of each item, the cost of the item per unit of measure, and the total combined cost of items in the ‘Cart’. b) At this point, users can increase or decrease the Item quantity, then select ‘Update’ to recalculate the amount. c) Users can also clear all items from the ‘Cart’, add the items to a new requisition, or add the items to an existing requisition.
5	Click ‘Add to New Req’: a) Users will be redirected to the ‘Items Tab/General Subtab’ of a new ‘Release Requisition’ displaying the selected items in the ‘Cart’. b) Users can edit the quantity and can complete the requisition.

23.2.8 Locate Items to Add to an Existing Requisition

Step	Locate Items to Add to an Existing Requisition Process Steps
1	Locate the desired item.
2	Enter the desired quantity in the field below the item price.
3	Click ‘Add to Cart’: a) The top right ‘Cart Icon’ updates the displayed value from zero (0) to the sum of the quantity users enter. b) The items selected stay in the ‘Cart’ if a new search is performed.
4	Click ‘Add to Existing Req’ – this displays existing requisitions in *NevadaEPro*, with the status.
5	Select ‘Existing Requisition’ – the selected requisition is highlighted.
6	Click ‘Add to Selected Req’: a) Users navigate to the selected ‘Requisition – Items Tab/General Subtab’. b) All selected items from the ‘Cart’ are now added and displayed. c) Users can edit the quantity and complete the requisition.

24. CREATING A PUNCHOUT ORDER

24.1 GENERAL

24.1.1 *NevadaEPro* allows DA and BP Users to create a punchout order.

24.1.2 A punchout order is a release from a Government to Business (G2B) contract.

24.1.3 A punchout order allows users to purchase goods directly from the vendor's website.

Step	Creating a Punchout Order Process Steps
1	Click  .
2	Click the 'G2B Punchout' from the dropdown menu – *NevadaEPro* will redirect the user to the G2B punchout shopping page.
3	Complete the required fields: a) Users must complete all fields on the page. b) Users will not be able to change the selections once they are redirected to the vendor's website.
4	Click 'Punchout': a) After users click 'Punchout', *NevadaEPro* redirects users to the vendor's website where they can select the items to purchase. b) Click 'Reset' to erase the selected information or click 'Cancel & Exit' to return to the *NevadaEPro* 'Homepage'.

24.2 VENDOR'S WEBSITE

24.2.1 Punchout vendors may maintain a website that is unique for the State. As such, the functionality of each vendor's website may be different.

Step	Vendor's Punchout Website Process Steps
1	Select 'Items' – Navigating and searching for items may involve different steps depending on the vendor's punchout website.
2	Complete Checkout: a) Generally, users will need to navigate to their shopping cart and click a 'Complete Checkout' or 'Complete Order Button'. b) Once users complete the order on the vendor's website, the user will be redirected back to *NevadaEPro* to complete the 'Release Punchout Requisition'.

24.3 PUNCHOUT ORDER GENERAL TAB

The purpose of the 'General Tab' is to capture header level data for the specific document. Some of the data is auto populated.

Step	Punchout Order General Tab Process Steps
1	Complete Required Fields – Users must complete all required fields marked with an asterisk (*) before saving the new document. Refer to ***Section 24.3.1, Required Field Descriptions for Punchout Order - General Tab***.
2	Click 'Save & Continue' – Once users save the document, protected fields are auto-filled, and the document is now searchable in *NevadaEPro* by authorized users, including from the user's 'Homepage'. Refer to ***Section 24.3.2, Protected Field Descriptions for Punchout Order - General Tab***.
3	Complete Optional Fields, as preferred. Refer to ***Section 24.3.3., Optional Field Descriptions for Punchout Order - General Tab***.
4	Click 'Save & Continue'.
5	Click 'Items Tab'.

24.3.1 Required Field Descriptions for Punchout Order - General Tab

REQUIRED FIELD DESCRIPTIONS – PUNCHOUT ORDER – GENERAL TAB	
Field Name	**Functionality**
Short Description	Title of the document and description of the goods or services to be purchased – should be descriptive and unique. It will default to G2B from selected vendor.
Print Format	Populated with default print format. It is recommended not to print requisitions.

24.3.2 Protected Field Descriptions for Punchout Order - General Tab

PROTECTED FIELD DESCRIPTIONS – PUNCHOUT ORDER – GENERAL TAB	
Field Name	**Functionality**
Requisition Number	Automatically generated upon the first save. *NevadaEPro* is configured to reflect the originating organization or department, appropriate fiscal year and sequential number.
Status	Initial status is set to 'In Progress' and will update as the requisition is processed. Identifies where the document is in the process and if the document is editable.
Fiscal Year	Fiscal year in which the document was created. Used as an indicator to the State's financial system of the fiscal year.

PROTECTED FIELD DESCRIPTIONS – PUNCHOUT ORDER – GENERAL TAB	
Field Name	**Functionality**
Organization	Originating organization of the document. Used to trigger approval paths.
Department	Selected department from G2B punchout shopping page. Used to trigger approval paths.
Location	Selected location from G2B punchout shopping page. Used to trigger approval paths and assign purchasers.
Entered Date	Automatically generated upon first save. Informational and used as an audit trail and reporting.
Requisition Type	Release is automatically populated. Used to trigger approval paths and assign purchasers.
Requestor	User who created the requisition. Used as an audit trail.
Estimated Cost	Calculated field based on cumulative value of items being ordered. Used to trigger approval paths.
Date Last Entered	Automatically generated upon the first save. Used as an audit trail and reporting.

24.3.3 Optional Field Descriptions for Punchout Order - General Tab

OPTIONAL FIELD DESCRIPTIONS – PUNCHOUT ORDER GENERAL TAB	
Field Name	**Functionality**
Solicitation Enabled	Only for Release Requisitions. Allows users to create a bid among the listed distributors on the Master Blanket. Not applicable on punchout orders.
Required by Date	Indicator of required delivery date of goods/services.
P-Card Enabled	Checkbox to document usage of PCard purchase; this field will only display if the G2B Blanket is PCard enabled. Allows users to track PCard purchases.
Type Code	***Note: Functionality is not configured in NevadaEPro.***
Purchaser	Dropdown of BP Users in organization of the document which allows user to select purchases for routing.
Contact	Open field for contact name of punchout requisition. Allows other users to ask questions about release punchout requisition.
Contact Phone	Open field for contact phone number of punchout requisition. Allows other users to ask questions about release punchout requisition.
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***

24.4 ITEMS TAB/GENERAL SUBTAB

24.4.1 The purpose of the 'Items Tab/General Subtab' is to capture what goods or services users are requesting. Since users have selected the items and quantity from the vendor's website, this data is not editable.

24.4.2 If users need to update items, they should cancel the current punchout order and create a new order.

Step	Items Tab/General Subtab Process Steps
1	Click the 'Item #'.
2	View 'Item Information'.
3	Click 'Items Tab/Vendors Subtab'.

24.5 ITEMS TAB/VENDORS SUBTAB

24.5.1 The purpose of the 'Items Tab/Vendors Subtab' is to capture vendor information.

24.5.2 The data is not editable on punchout orders because this information is selected before punching out to the vendor's website.

24.5.3 Users can also review the vendor information on the 'Vendors Tab' for all items listed on the punchout order.

Step	Items Tab/Vendors Subtab Process Steps
1	View vendor information.
2	Click 'Items Tab/Address Subtab'.

24.6 ITEMS TAB/ADDRESS SUBTAB

24.6.1 The purpose of the 'Items Tab/Address Subtab' is to capture 'Ship-To' and 'Bill-To' addresses for individual items.

24.6.2 This data is not editable on punchout orders because this information is selected before punching out to the vendor's website.

24.6.3 If users need to update addresses, they should cancel the current punchout order and create a new order.

24.6.4 Users can also see the 'Ship-To' and 'Bill-To' address for all items on the 'Address Tab'.

Step	Items Tab/Address Subtab Process Steps
1	View Address Information.
2	Click ‘Items Tab/Accounting Address’ Subtab’.

24.7 ITEMS TAB/ACCOUNTING SUBTAB

Refer to ***Section 13, Items Tab/Accounting Subtab - Common Tabs***.

24.8 ITEMS TAB/NOTES SUBTAB

Refer to ***Section 15, Items Tab/Notes Subtab - Common Tabs***.

24.9 VENDORS TAB

24.9.1 The purpose of the ‘Vendors Tab’ is to capture vendor information for all items listed on the punchout order.

24.9.2 This data is not editable on punchout orders.

Step	Vendors Tab Process Steps
1	View Vendor Information.
2	Click ‘Address Tab’.

24.10 ADDRESS TAB

24.10.1 The purpose of the ‘Address Tab’ is to provide the ‘Ship-To’ and ‘Bill-To’ address that applies to all items listed on the punchout order.

24.10.2 The address data is not editable on punchout orders.

24.10.3 If users need to update addresses, they should cancel the current punchout order and create a new order.

Step	Address Tab Process Steps
1	View Address Information.
2	Click ‘Accounting Tab’.

24.11 CREATING A PUNCHOUT ORDER – ADDITIONAL TABS TO COMPLETE

Punchout Order – Additional Tabs to Complete	
Tab Description	**Reference**
Accounting Tab	***Section 17, Accounting Tab - Common Tabs***
Routing Tab	***Section 18, Routing Tab - Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab - Common Tabs***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab - Common Tabs***
Notes Tab	***Section 21, Notes Tab - Common Tabs***
Reminders Tab	***Section 22, Reminders Tab - Common Tabs***

24.12 SUMMARY TAB

24.12.1 The 'Summary Tab' provides an overview of all the information provided by users on the previous tabs for review prior to submitting the punchout order for approval.

24.12.2 Once the punchout order is submitted, users cannot edit the document.

Step	**Summary Tab Process Steps**
1	Scroll to the bottom of the 'Summary Tab'.
2	Click 'Submit for Approval'.

24.12.3 Once the requisition is submitted for approval, an 'Approval Path Section' will display on the 'Summary Tab'.

24.13 ENTERING P-CARD INFORMATION

24.13.1 If users select the punchout requisition as PCard enabled, users will be prompted to enter the PCard information on the PO before it is sent to the vendor.

24.13.2 The release type of the PO determines which user can enter the PCard information.

24.13.2.1 If the punchout PO is a 'Direct Release', the DA user can enter the information.

24.13.2.2 If the punchout PO is a 'Standard Release', the BP User enters the information.

Step	Entering PCard Information Process Steps
1	Select ‘Vendor Notification Action’ and click ‘Save & Continue’.
2	Enter required fields for PCard information: a) Users must enter the card ID, cardholder name and expiration month/year. b) Defaults to the user’s default ‘Bill-To’ Address.
3	Click ‘Save & Continue’: a) Click ‘Reset’ to undo the entered information or click ‘Cancel & Exit’ to return to the ‘Summary Tab’ of the PO. b) After users click ‘Save & Continue’, the PO will be sent to the vendor.

24.14 WORKFLOW DIAGRAM

Refer to ***Section 44.2, Punchout Workflow Diagrams.***

25. CREATING A STANDARD OR DIRECT RELEASE REQUISITION

Users may create a new ‘Release Requisition’ by following the steps below:

Step	Create an Open Market Requisition Process Steps
1	Click the ‘Plus (+) Icon’.
2	Click ‘Requisition’ in the dropdown to create a requisition from scratch.

25.1 GENERAL TAB

25.1.1 The purpose of the ‘General Tab’ is to capture header level data for the specific document.

25.1.2 Each document template is blank when created from scratch.

25.1.3 Users must complete all required fields and save the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

Step	Release Requisition General Tab Process Steps
1	Select the ‘Requisition Type – Release’ to access the ‘Release Requisition’ template.
2	Complete ‘Required Fields’: a) Refer to ***Section 25.1.4, Required Field Descriptions for Release Requisition - General Tab***. b) Users must complete all required fields marked with an asterisk (*) before saving the new document.
3	Click ‘Save & Continue’: a) Once users save the document, protected fields are auto-filled. b) The document will now be searchable in *NevadaEPro* by an authorized user, including from the user's Homepage. c) Refer to ***Section 25.1.5, Protected Field Descriptions for Release Requisition - General Tab***.
4	Complete ‘Optional Fields’ as applicable – refer to ***Section 25.1.6, Optional Field Descriptions for Release Requisition - General Tab***.
5	Click ‘Save & Continue’.
6	Click ‘Items Tab’.

25.1.4 Required Field Descriptions for Release Requisition - General Tab

REQUIRED FIELD DESCRIPTIONS – RELEASE REQUISITION GENERAL TAB	
Field Name	**Functionality**
Short Description	Title of the document and description of the goods or services to be procured – should be descriptive and unique.
Department	Originating department of the document. Configured to trigger approval paths and/or assign purchasers.
Location	Originating location of the document. Configured to trigger approval paths and/or assign purchasers.
Print Format	Populated with default print form. It is not recommended to print requisitions.

25.1.5 Protected Field Descriptions for Release Requisition - General Tab

PROTECTED FIELD DESCRIPTIONS – RELEASE REQUISITION GENERAL TAB	
Field Name	**Functionality**
Requisition Number	Automatically generated upon the first save. Configured to reflect the originating organization or department, document fiscal year and sequential number.
Status	Initial status is set to ‘In Progress’ and will update as the requisition is processed. Configured to trigger interface transactions, if applicable.
Fiscal Year	Fiscal year in which the document was created.
Organization	Originating organization of the document. Used for approval paths.
Entered Date	Automatically generated upon first save. Used as an audit trail and for reporting.
Requestor	User who created the requisition. Used as an audit trail and for reporting.
Estimated Cost	Calculated field based on items. Primary criteria for triggering approval paths.
Date Last Updated	Automatically generated upon each save. Used as an audit trail and for reporting.
Date Last Entered	Automatically generated upon the first save. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.

25.1.6 Optional Field Descriptions for Release Requisition - General Tab

OPTIONAL FIELD DESCRIPTIONS – RELEASE REQUISITION GENERAL TAB	
Field Name	**Functionality**
Solicitation Enabled	Used for multi-vendor contracts when a secondary level of competition is needed.
Required by Date	Required delivery date of goods/services.
Requisition Type	Requests for contracted items - release is selected
Type Code	***Note: Functionality not configured in NevadaEPro.***
Purchaser	Dropdown of BP Users in organization of the document. Allows user to select purchasers.
Contact	Populated with requestor's name based on user profile. May be seen by other users to ask questions about the release requisition.
Contact Phone	Populated with requestor's phone number based on user profile. May be seen by other users to ask questions about the release requisition.
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Tax Rate	***Note: Functionality not configured in NevadaEPro.***

25.2 ITEMS TAB/GENERAL SUBTAB

25.2.1 The 'Items Tab/General Subtab' captures what contract goods or services users are requesting/ordering. The 'Release Requisition' allows users to search for items on currently active contracts.

25.2.2 Refer to ***Section 10, Items Tab/General Subtab – Common Tabs***.

25.3 ITEMS TAB/VENDORS SUBTAB

The 'Items Tab/Vendors Subtab' captures vendor information for individual items. If the MBPO has distributors listed, users can change the vendor to a distributor listed by following the steps below.

25.3.1 Change Vendor to a Distributor

Step	Change Vendor to a Distributor Process Steps
1	Click 'Change Vendor'.
2	Select the vendor and click 'Select' – The vendors listed are only those on the Master Blanket vendor distributor list.
3	Select items to apply to the vendor.
4	Click 'Apply to Selected'.

25.4 CREATING A STANDARD OR DIRECT RELEASE REQUISITION - ADDITIONAL TABS TO COMPLETE

Standard or Direct Release Requisition – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/Address Subtab	***Section 12, Items Tab/Address Subtab – Common Tabs***
Items Tab/Accounting Subtab	***Section 13, Items Tab/Accounting Subtab – Common Tabs***
Items Tab/Notes Subtab	***Section 15, Items Tab/Notes Subtab – Common Tabs***
Note: Refer to Section 25.6 for additional tabs to complete.	

25.5 VENDOR TAB

25.5.1 The purpose of the 'Vendor Tab' is to capture recommended vendors for all items on the requisition.

25.5.2 The vendor data automatically populates based on the data contained on the vendor's profile in *NevadaEPro.*

25.5.3 Users may update the vendor's Remit to Address on the 'Vendors Tab'.

25.5.4 Users may also view and update vendor information for individual items on the 'Items Tab/Vendors' (when a particular distributor will provide items on the requisition.

25.5.5 If vendors require a different 'Remit or PO Mailing Address' than what is showing as the default address, users may update the address with any other address listed on the vendor's profile.

Step	Select a Different Remit or PO Mailing Address Process Steps
1	Select an address from 'Vendor Remit to Address': a) If the address is not available, the vendor must add the address to their profile before users can update the release. b) The 'Remit Address' listed will auto-populate on the Invoice. c) The AP user has the ability to change the 'Remit to Address' if necessary, on the 'General Tab' of the invoice document.
2	Click 'Save & Continue'
3	Click 'Address Tab'.

25.6 ADDITIONAL TABS TO COMPLETE FOR A STANDARD OR DIRECT RELEASE REQUISITION

Additional Tabs to Complete - Standard or Direct Release Requisition	
Tab Description	**Reference**
Address Tab	***Section 16, Address Tab – Common Tabs.***
Accounting Tab	***Section 17, Accounting Tab – Common Tabs***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs***

25.7 SUMMARY TAB

25.7.1 The 'Summary Tab' provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

25.7.2 Once the document is submitted, users cannot edit the document.

25.7.3 When 'Direct Release Requisitions' are approved, a PO is created and sent directly to the vendor.

25.7.4 When a 'Standard Release Requisition' is approved, the document is routed to the BP User, before being converted to a PO and sent to the vendor for fulfillment. The PO is created and routed to the BP User, to be sent to the vendor for fulfillment.

25.7.5 The 'Summary Tab' is divided into five (5) sections as follows:

25.7.5.1 The 'Validation Errors and Warnings Section' is displayed at the top of the 'Summary Tab'.

A. Errors in 'Red' must be corrected before the requisition can be submitted for approval.

B. Warnings in 'Yellow' will not prevent the requisition from being submitted for approval.

25.7.5.2 The 'Header Information Section' contains information from the General Tab, Vendors Tab, Address Tab, and Notes Tab.

25.7.5.3 The 'Attachments Section' contains a link to the attached files and forms.

25.7.5.4 The ‘Reminder List Section’ contains any reminders for the requisition.

25.7.5.5 The ‘Item Information Section’ contains items entered on the requisition. Click the ‘Plus (+) Icon’ to expand the view to see the items.

Step	Summary Tab Process Steps
1	Scroll to the bottom of the ‘Summary Tab’.
2	Click ‘Submit for Approval’.

25.8 WORKFLOW DIAGRAMS

25.8.1 Standard Release

Refer to ***Section 44.3, Standard Release Requisition Workflow Diagram.***

25.8.2 Direct Release

Refer to ***Section 44.4, Direct Release Requisition Workflow Diagram.***

26. CREATING AN OPEN MARKET REQUISITION

26.1 GENERAL

26.1.1 *NevadaEPro* allows DA and BP Users to create open market requisitions.

26.1.2 The purpose of the open market requisition is to request goods or services that are not available on an existing contract.

26.1.3 Common uses of this Requisition type includes the ability to:

26.1.3.1 Request a formal procurement;

26.1.3.2 Request and receive informal price quotes from vendors for small purchases; and

26.1.3.3 Provide documentation and request approval of a special purchasing arrangement such as:

A. Sole source purchases;

B. Emergency purchases;

C. Unapproved purchases that now need to be paid for; or

D. Purchases from a purchasing cooperative.

26.2 OPEN MARKET REQUISITION CREATION

On the *NevadaEPro* Homepage, users may create a new open market requisition by following the steps below:

Step	Create an Open Market Requisition Process Steps
1	Click the ‘Plus (+) Icon’.
2	Click ‘Requisition’ in the dropdown to create a requisition from scratch.

26.3 GENERAL TAB

26.3.1 The purpose of the ‘General Tab’ is to capture header level data for the specific document.

26.3.2 Each document template is blank when created from scratch.

26.3.3 Users must complete all required fields and save the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

Step	Open Market Requisition General Tab Process Steps
1	Select the 'Requisition Type – Open Market' to access the 'Open Market Requisition' template.
2	Complete 'Required Fields' – Users must complete all required fields marked with an asterisk (*) on the 'General Tab', including custom columns that have additional responses required, before saving the new document. Refer to ***Section 26.3.4, Required Field Descriptions for Open Market Requisition - General Tab***.
3	Click 'Save & Continue': Once users save a document, protected fields are auto-filled. a) The document will now be searchable in *NevadaEPro* by an authorized user, including from the user's Homepage. b) Refer to ***Section 26.3.5, Protected Field Descriptions for Open Market Requisition - General Tab***.
4	Complete 'Optional Fields' as applicable – refer to ***Section 26.3.6, Optional Field Descriptions for Open Market Requisition - General Tab.***
5	Click 'Save & Continue'.
6	Click 'Items Tab'

26.3.4 Required Field Descriptions for Open Market Requisition - General Tab

REQUIRED FIELDS – OPEN MARKET GENERAL TAB	
Field Name	**Functionality**
Short Description	Description of the goods or services to be procured – should be descriptive and unique.
Department	Originating department of the document. Configured to trigger approval paths and/or assign purchasers.
Location	Originating location of the document. Configured to trigger approval paths and/or assign purchasers.
Print Format	Populated with default print form. It is recommended not to print requisitions.

26.3.5 Protected Field Descriptions for Open Market Requisition - General Tab

PROTECTED FIELDS – OPEN MARKET GENERAL TAB	
Field Name	**Functionality**
Requisition Number	Automatically generated upon the first save. Configured to reflect the originating organization or department, document fiscal year and sequential number.

PROTECTED FIELDS – OPEN MARKET GENERAL TAB	
Field Name	**Functionality**
Status	Initial status is set to 'In Progress' and will update as the requisition is processed.
Fiscal Year	Fiscal year in which the document was created.
Organization	Originating organization of the document. Used to trigger approval paths.
Entered Date	Automatically generated upon first save. Used as an audit trail and for reporting.
Requestor	User who created the requisition. Used as an audit trail and for reporting.
Estimated Cost	Calculated field based on items. Primary criteria for triggering approval paths.
Date Last Entered	Automatically generated upon the first save. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.

26.3.6 Optional Field Descriptions for Open Market Requisition - General Tab

OPTIONAL FIELD DESCRIPTIONS – OPEN MARKET GENERAL TAB	
Field Name	**Functionality**
Solicitation Enabled	Only used for release requisitions.
Required by Date	Required delivery date of goods/services.
Requisition Type	Determines which requisition template is used. Open Market should be selected.
Type Code	***Note: Functionality is not configured within NevadaEPro***
Purchaser	Dropdown of BP Users in organization of the document. Allows users to select purchasers, if specific routing is not configured.
Contact	Populated with requestor's name based on user profile. May be seen by other users to ask questions about open market requisitions.
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Tax Rate	***Note: Functionality is not configured within NevadaEPro***
PCard Desired	Indicated PCard enabled requested PO

26.4 OPEN MARKET REQUISITION - ADDITIONAL TABS TO COMPLETE

Open Market Requisition – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/General Subtab	***Section 10, Items Tab/General Subtab – Common Tabs***
Items Tab/Vendors Subtab	***Section 11, Items Tab/Vendor Subtab – Common Tabs***
Items Tab/Address Subtab	***Section 12, Items Tab/Address Subtab – Common Tabs***
Items Tab/Accounting Subtab	***Section 13, Items Tab/Accounting Subtab – Common Tabs***
Items Tab/Notes Subtab	***Section 15, Items Tab/Notes Subtab – Common Tabs.***
Note: Refer to Section 26.6 for additional tabs to complete.	

26.5 VENDOR TAB

26.5.1 The purpose of the 'Vendor Tab' is to capture recommended vendors for all items on the requisition.

26.5.2 Users may also capture recommended vendors for each of the items at the 'Items Tab/Vendors'.

26.5.3 Adding vendors to the requisition satisfies three (3) needs that are dependent on the purpose of the requisition:

26.5.3.1 Request a formal procurement - adding vendors to the requisition acts as a recommendation to the BP User who will create the bid solicitation.

26.5.3.2 Execute a small purchase through the receipt of informal quotes (typically pricing) from vendors - adding vendors to the requisition will allow the requisitioner to send electronic notifications to the vendors to submit their quotes.

26.5.3.3 Document an emergency purchase or sole source procurement - adding the vendor specifies the vendor to whom the purchase is being made and once approved to whom a PO will ultimately be issued.

26.5.4 The 'Vendors Tab' will be used extensively if the requisition is used for informal price quotes; e.g., for small purchases.

26.5.5 Adding Vendor(s)

Step	Adding Vendor(s) to an Open Market Requisition Process Steps
1	Click 'Lookup' and 'Add Vendors':

Step	Adding Vendor(s) to an Open Market Requisition Process Steps
	a) A pop-up window will open. b) Click ‘Add New Vendor’ to add an unregistered vendor to the document.
2	Enter search information in the fields.
3	Click ‘Find It’.
4	Select the vendor(s).
5	Click ‘Save & Exit’ at the bottom of the screen: a) Click ‘Save & Continue’ to add additional vendors to the requisition or click ‘Save & Next Page’. b) Users can also select vendors based on NIGP codes by clicking ‘Find Vendors for All Commodity Codes’ on the requisition. c) *NevadaEPro* populates the vendor information on the tab.

26.5.6 Setup Informal Price Quote

26.5.6.1 The following fields allow users to set up an informal price quote request to vendors listed on the ‘Vendors Tab’.

26.5.6.2 The informal price quote is used to collect pricing from vendors for small purchases. This allows for the required three (3) price quotes from vendors.

26.5.6.3 If the purpose of the requisition is to request a procurement, this functionality will not be used

FIELD DESCRIPTIONS – INFORMAL PRICE QUOTE	
Field Name	**Functionality**
Publish Informal Bid on Web	Allows informal bid to be viewed by vendors. Selecting this will activate the ‘Informal Bid Section’ for selection/entry of required dates. Recommended when users want to receive price quotes from vendors for small purchases. Visible externally and to vendors. Must be checked to proceed in setting up an informal bid.
Show Unit Prices to Vendors	Passes the item prices from the requisition item(s) to the vendors on the informal bid. Used when the requestor wants to give vendors a sense of expected pricing. Visible externally and to vendors.
Allow Vendor to Change Quantity	Enables the vendor to change the quantity of items on the bid. Not recommended to allow vendors to change the quantity.
Allow Vendor to change UOM	Enables the vendor to change the UOM to match their sales and/or packaging standards.

FIELD DESCRIPTIONS – INFORMAL PRICE QUOTE	
Field Name	**Functionality**
Unrestricted Informal Bid, all Vendors can view and respond	Allows all vendors to view and respond to informal bid when published. Used to increase competition throughout the vendor community. Visible externally and to vendors.
Restricted Informal Bid, only selected Vendors can view and respond.	Allows only selected vendors to view and respond to informal bid when published. Used when purchasing goods/services is sensitive or when limited competition is acceptable. Not intended to be visible to the public. Visible only to vendors selected on the information bid.
Bid Ending Date	Required for informal bid. Gives the vendor a deadline to submit their quote.
Bid Available Date	Date the bid is visible to vendors.
Purge Date	***Note: Documents will not be purged from NevadaEPro in order to retain an audit trail of all transactions.***

Step	Setup Information Price Quote Process Steps
1	Select appropriate settings for Informal Bid.
2	Input ‘Bid Available Date’ and ‘Bid Ending Date’.
3	Click ‘Save & Continue’.
4	Click ‘Notify Vendors of Informal Bid’.
5	Select vendors to receive notification – Users can select all vendors to receive the notification or only select specific vendors.
6	Click ‘Send Notification to Selected Vendors’.
7	Edit Informal Quote email, as appropriate: a) Users can add additional email recipients and can edit the ‘Subject’ and Text’. b) The fields marked with an asterisk (*) are required.
8	Upload attachments, as appropriate – Attachments typically include product or service specifications, PDF forms, or other documentation to assist vendors in submitting compliant quotes.
9	Click ‘Send Notification’: a) Click’ Cancel & Exit’ to exit out of the page without sending the notification. b) A pop-up message will open to ensure that the user wishes to send the notification to the vendors. c) Click ‘Cancel’ to exit out of the pop-up window sending the notifications.
10	Click ‘OK’.

26.5.7 Delete Vendor(s)

Users can delete selected vendors or all vendors on the 'Vendors Tab'.

Step	Delete Vendor(s) Process Steps
1	Select the vendor from the 'Delete Column' – Select 'Delete All' to select all vendors on the 'Bidders Tab'.
2	Click 'Save & Continue'.
3	Click 'Address Tab'.

26.6 ADDITIONAL TABS TO COMPLETE FOR OPEN MARKET REQUISITION

Additional Tabs to Complete for Open Market Requisition	
Tab Description	**Reference**
Address Tab	***Section 16, Address Tab – Common Tabs***
Accounting Tab	***Section 17, Accounting Tab – Common Tabs***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs***

26.7 SUMMARY TAB

26.7.1 The 'Summary Tab' provides an overview of all the information provided by users on the previous tabs for review prior to submitting the document for approval.

26.7.2 Once the document is submitted, users cannot edit the document.

26.7.3 If the requisition is being used to obtain informal price quotes from vendors, it should not be submitted for approval until informal price quotes are received and evaluated and a vendor(s) has been recommended for award.

26.7.4 The 'Summary Tab' is divided into five (5) sections as follows:

26.7.4.1 Validation Errors and Warnings Section is displayed at the top of the 'Summary Tab'.

A. Errors in red must be corrected before the requisition can be submitted for approval.

B. Warnings in yellow will not prevent the requisition from being submitted for approval.

26.7.4.2 Header Information Section contains information from the following tabs:

A. General Tab;
B. Vendors Tab;
C. Address Tab; and
D. Notes Tab.

26.7.4.3 'Attachments Section' contains a link to the attached files and forms.

26.7.4.4 'Reminder List Section' contains any reminders for the requisition.

26.7.4.5 Item Information Section contains items entered on the requisition. Click the 'Plus (+) Icon' to expand the view to see the items.

Step	Summary Tab Process Steps
1	Scroll to the bottom of the 'Summary Tab'.
2	Click 'Submit for Approval' – Once the requisition is submitted for approval, an 'Approval Path Section' will display on the 'Summary Page'.

27. EVALUATING INFORMAL QUOTES FROM VENDORS

27.1 GENERAL

27.1.1 If the requisition is being used to solicit informal price quotes from vendors, users may view quotes from vendors as they are submitted.

27.1.2 In addition, users may input quotes on behalf of vendors to ensure that all quotes are recorded in *NevadaEPro*. This is commonly done by users when they receive price quotes from vendors via email or fax.

27.2 INPUT VENDOR QUOTE INTO SYSTEM

27.2.1 The process for entering quotes on behalf of vendors varies based on whether the informal bid is 'Restricted' or 'Unrestricted'.

27.2.2 If the informal bid is 'Restricted', all vendors who may submit quotes (through *NevadaEPro* or via email/fax) should be on the 'Vendors Tab'.

27.2.3 However, if the informal bid is 'Unrestricted', users may receive email/fax quotes from vendors who are not on the 'Vendors Tab'. This situation will necessitate adding the vendor to the 'Vendors Tab' before manual entry of their quote into *NevadaEPro*.

Step	Evaluating Informal Quotes from Vendors Process Steps
1	Click 'Lookup & Add Vendors': a) A pop-up window will open to display the 'Vendor Lookup Page'. b) This step may be skipped if the vendor has already been added to the informal bid.
2	Enter 'Search Criteria' and click 'Find It' – This step may be skipped if the vendor has already been added to the informal bid.
3	Select 'Vendor' and click 'Save & Exit': a) This step may be skipped if the vendor has already been added to the informal bid. b) If the vendor is not currently registered the *NevadaEPro* Vendor Administrator should be contacted for further assistance via email at nevadaepro@admin.nv.gov.
4	Click 'Create' under informal quote.
5	Input 'Quote Pricing and Freight Charge'.
6	Click 'Save & Continue': a) Click 'Save & Continue' to save the entered information and continue entering information on the page; or b) Click 'Save & Exit' to save the entered information and to exit out of the page; or c) Click 'Close Window' to exit out of the page without saving.
7	Click 'Manage Attachments': a) If there are files or other information that were received from the vendor, users should add them as attachments to the quote. b) Users should add a scanned version of the price quote if received by email including any related files attached to the email or a copy of the fax.
8	Click 'Add File'.
9	Input file name and description.
10	Click 'Choose File' – a pop up window will open.
11	Locate the file and click 'Open'.
12	Click 'Save & Exit': a) Click 'Save & Continue' to save the attachment and to view the attachment file details; or b) Click 'Reset' to delete the attached file or click 'Cancel & Exit' to exit out of the page without saving.
13	After users click 'Save & Exit', users have the option to mark the file as 'Confidential'.

27.3 VIEW VENDOR INFORMAL QUOTES

27.3.1 As informal quotes are submitted by vendors, users may view and review the submitted quotes.

27.3.2 Each quote received must be viewed individually to access any attachments that have been submitted by the vendor.

Step	View Vendor Informal Quote Process Steps
1	Click the ‘View/Edit’ link for the quote.
2	Review quote contents including pricing and attachments: a) Click ‘Apply Pricing to Req Items’, which will apply the pricing from the vendor’s informal quote to the pricing of items on the requisition. b) Attach files to the informal quote by clicking ‘Manage Attachments’.
3	Click ‘Close Window’.

27.4 TABULATE INFORMAL QUOTES

27.4.1 Once all vendor quotes have been reviewed individually, users can perform a side-by-side comparison of the results.

27.4.2 However, until the ‘Bid Ending Date’ has passed, vendors may still withdraw, modify, and resubmit their quotes.

27.4.3 If all quotes have been received, users are advised to change the ‘Bid Ending Date’ to the current date and time. Once this action is performed, all quotes submitted will be locked in *NevadaEPro.*

Step	Tabulate Informal Quote Process Steps
1	Click ‘Informal Quote Tabulation’.
2	Select ‘Recommended Vendor(s)’ at top of item level – Users may select recommended vendors for all items by clicking on the checkbox next to the vendor name or by individual items by clicking the appropriate item box.
3	Click ‘Apply Selected Pricing to Req Items’: a) This action will apply the pricing from the recommended vendor’s quote and apply it to the items on the requisition. b) The requisitions overall value, item pricing and quantities will now reflect the vendor quotes received.

Step	Tabulate Informal Quote Process Steps
4	Click ‘Select and Apply Attachments’, as applicable: a) If attachments from the vendor’s quote need to be moved to the header level ‘Attachments Tab’ on the requisition, users may also perform that action on the ‘Attachments Tab’. b) This is normally done if the PO to be created needs to include vendor attachments from the vendor’s quote.
5	Select ‘Attachments’ and click ‘Save & Exit’: a) Click ‘Save & Continue’ to save the updates and to remain on the page. b) Click ‘Exit’ to exit out of the page without saving.
6	Click ‘Close Window’: a) The vendors whose quote pricing was applied to the requisition will be marked as recommended on the ‘Vendors Tab’ in the case where one (1) vendor is selected for all items. b) If multiple vendors are recommended for award, users will see the vendor information on the ‘Summary Tab’. c) The vendors will not be selected for ‘Recommended’ on the ‘Vendors Tab’. d) Users may modify the recommendations by unclicking/clicking the appropriate recommendation boxes for each vendor and then clicking ‘Save & Continue’. e) If no changes are needed, users may move on to other tabs on the requisition.

27.4.4 Once the requisition is fully approved, it will be converted to an ‘Open Market Purchase Order’ for the recommended vendor.

28. CREATING A DEMAND REQUISITION

28.1 GENERAL

28.1.1 The purpose of the 'Demand Requisition' is to gather the demand, or the estimated quantity needed for certain goods, from across the organization's business units, and to aggregate the demand.

28.1.2 *NevadaEPro* allows BP Users, when explicitly granted access to the 'Demand Requisition' document template, to create a 'Demand Requisition'.

28.1.3 The aggregation of the demand from across the organization, empowers procurement to harness the buying power of the whole organization.

28.1.4 The use of the 'Demand Requisition' is one important component to drive modern strategic sourcing in the public sector.

Step	Creating a Demand Requisition Homepage Process Steps
1	Click the 'Plus (+) Icon'.
2	Click 'Requisition' in the dropdown to create a requisition from scratch.

28.2 GENERAL TAB

28.2.1 The purpose of the 'General Tab' is to capture header level data for the specific document.

28.2.2 Each document template is blank when created from scratch.

28.2.3 Users complete the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

Step	Demand Requisition General Tab Bids Process Steps
1	Select 'Demand' from the 'Requisition Type' dropdown to access the 'Demand Requisition' template.
2	User must complete all required fields marked with an asterisk (*) before saving the new document. Refer to ***Section 28.2.4, Required Field Descriptions for Demand Requisition – General Tab***.
3	Click 'Save & Continue' – Once users save the document, protected fields are auto-filled, and the document is now searchable in *NevadaEPro*, including from the user's Homepage – refer to ***Section 28.2.5, Protected Field Descriptions for Demand Requisition – General Tab.***
4	Complete 'Optional Fields' as preferred – refer to ***Section 28.2.6, Optional Field Descriptions for Demand Requisition – General Tab***.
5	Click 'Items Tab'.

28.2.4 Required Field Descriptions for Demand Requisition – General Tab

REQUIRED FIELD DESCRIPTIONS FOR DEMAND REQUISITION – GENERAL TAB	
Field Name	**Functionality**
Short Description	Title of the document and description of the goods or services to be procured. Should be descriptive and unique. Searchable in internal searches
Department	Originating department of the document. Ship-To and Bill-To addresses are made available based on the department selected. Configured to trigger approval paths.
Location	Originating location of the document. Searchable in internal searches. Configured to trigger approval paths and assign purchaser.
Print Format	Populated with default print format. It is recommended to not print bids.

28.2.5 Protected Field Descriptions for Demand Requisition – General Tab

PROTECTED FIELD DESCRIPTIONS FOR DEMAND REQUISITION – GENERAL TAB	
Field Name	**Functionality**
Requisition Number	Automatically generated upon the first save. Searchable in internal searches. Configured to reflect the originating organization or department, document fiscal year and sequential number.
Status	Initial status is set to 'In Progress' and will update as the requisition is processed and if the document is editable.
Fiscal Year	Indicator to the State's financial system of the fiscal year in which the document was created.
Organization	Originating organization of the document. May not be visible in certain statuses by other organizations. May be used for approval paths.
Entered Date	Automatically generated upon the first save. Used as an audit trail and for reporting.
Requestor	User who created the requisition. Used as the primary criteria for triggering approval paths.
Estimated Cost	Calculated field based on items. Used as the primary criteria for triggering approval paths.
Date Last Entered	Automatically generated upon the first save. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.

28.2.6 Optional Field Descriptions for Demand Requisition – General Tab

OPTIONAL FIELD DESCRIPTIONS FOR DEMAND REQUISITION – GENERAL TAB	
Field Name	**Functionality**
Solicitation Enabled	Only for release type requisitions. Allows users to create a bid among the listed distributors on the master blanket. Used for multi-vendor contracts when a secondary level of competition is needed.
Required by Date	Required delivery date of goods/services.
Requisition Type	Determines which requisition template is used. Demand should be selected.
Type Code	***Note: Functionality is not configured in NevadaEPro.***
Purchaser	Dropdown of BP Users in the organization of the document. Allows users to select purchaser.
Contact	Populated with requestor's name based on user's profile. May be used by participants to ask questions about the 'Demand Requisition'.
Contact Phone	Populated with requestor's phone number based on user's profile. May be used by participants to ask questions about the 'Demand Requisition'.
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***
PCard Desired	Indicates PCard enabled requested PO.

28.3 ITEMS TAB/GENERAL SUBTAB

28.3.1 The purpose of the 'Items Tab/General Subtab' is to capture the goods or services that users request participants respond to with estimated demand or quantity.

28.3.2 Users may add items using one (1) of three (3) methods:

28.3.2.1 Searching for existing items;
28.3.2.2 Adding new items from scratch; or
28.3.2.3 Uploading items from a spreadsheet.

28.3.3 Refer to ***Section 10, Items Tab/General Subtab – Common Tabs***.

28.4 DEMAND REQUISITION - ADDITIONAL TABS TO COMPLETE

Demand Requisition – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/General Subtab	***Section 10, Items Tab/General Subtab – Common Tabs***
Items Tab/Vendors Subtab	***Section 11, Items Tab/Vendor Subtab – Common Tabs***

Demand Requisition – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/Address Subtab	***Section 12, Items Tab/Address Subtab – Common Tabs***
Items Tab/Noes Subtab	***Section 15, Items Tab/Notes Subtab – Common Tabs***
Note: Refer to Section 28.12 for additional tabs to complete.	

28.5 PARTICIPANTS TAB

The purpose of the 'Participants Tab' is to capture which agencies and which users from each agency, may enter a response, or provide the estimated demand for the goods or services listed on the 'Demand Requisition'.

28.6 ADD ORGANIZATIONS, DEPARTMENTS AND PARTICIPANTS

Users must first select the dates when the 'Demand Requisition' will be available for response from other users and then select users from the selected organization(s) and department(s).

Step	Demand Requisition Add Organizations, Departments and Participants Process Steps
1	Select 'Available on Date' by clicking the 'Calendar Icon'.
2	Select 'Respond by Date' by clicking the 'Calendar Icon'.
3	Select the organization(s) from the dropdown list.
4	Select the department(s) from the corresponding organization – If users select 'AGY - Agency Umbrella Master Control', then all BP and DA Users in that organization are able to participate.
5	Click 'Save & Continue' – Users can select additional organizations and departments if needed.
6	Click 'Find User': a) A new window will open to display the list of users from the selected organizations and departments. b) Only BP and DA Users from the selected organizations and departments will be able to participate.
7	Select the participant(s) individually – Users can also select the box under 'Select' to select all the participants.'
8	Click 'Save & Exit': a) Users will then display in the 'Participant List' section. b) Click 'Close Window' to exit out of the window without saving.

Step	Demand Requisition Add Organizations, Departments and Participants Process Steps
9	Click ‘Email Participants’ – A message will display to users to note that participants have been emailed.
10	Click ‘OK’.

28.7 DELETE ORGANIZATIONS, DEPARTMENTS AND PARTICIPANTS

Users can delete participants and/or organizations from the ‘Demand Requisition’ so they will not be able to respond when the document is available for response.

Step	Demand Requisition Delete Organizations, Departments and Participants Process Steps
1	Select the organization and department to be deleted – Users can select the ‘Delete All’ to delete all the selected organizations and departments.
2	Click ‘Save & Continue’.
3	Select the participant(s) to be deleted – Users can ‘Delete All’ to delete all participants from the ‘Participants List’.
4	Click ‘Delete’.

28.8 VENDORS TAB – DEMAND REQUISITION

28.8.1 The purpose of the ‘Vendors Tab’ is to capture recommended vendors for all items on the requisition.

28.8.2 Users may also capture recommended vendors for each item at the ‘Items Tab/Vendors Subtab’.

28.8.3 Adding vendors to the requisition satisfies three (3) needs that are dependent on the purpose of the requisition:

28.8.3.1 Purpose: Request a formal procurement - adding vendors to the requisition acts as a recommendation to the buyer who will create the downstream bid.

28.8.3.2 Purpose: Execute a small purchase through the receipt of informal quotes (typically pricing) from vendors - adding vendors to the requisition will allow the requisitioner to send electronic notifications to the vendors to submit their quotes.

28.8.3.3 Purpose: Document an emergency purchase or sole source procurement - adding the vendor specifies the vendor to whom the purchase is being made and to whom a PO will ultimately be issued, once approved.

28.8.4 The 'Vendors Tab' will be used extensively if the requisition is used for informal price quotes (e.g., for small purchases).

28.9 ADD VENDOR(S)

Step	Demand Requisition Add Vendors Process Steps
1	Click 'Lookup & Add Vendors': a) A pop-up window will open. b) Click 'Add New Vendor' to add an unregistered vendor to the document.
2	Enter search information in fields.
3	Click 'Find It'.
4	Select the vendor(s).
5	Click 'Save & Exit' at the bottom of the screen: a) Click 'Save & Continue' to add additional vendors to the requisition or click 'Save & Next Page'. b) Users can also select vendors based on NIGP codes by clicking 'Find Vendors for All Community Codes on the Requisition'. c) *NevadaEPro* populates the vendor information on the tab.

28.10 DELETE VENDOR(S) – DEMAND REQUISITION

Users can delete selected vendors or all vendors on the 'Vendors Tab'.

Step	Demand Requisition Delete Vendors Process Steps
1	Select the vendor from the 'Delete' column – Users can select 'Delete All' to select all vendors on 'Bidders Tab'.
2	Click 'Save & Continue'.
3	Click 'Responses Tab'.

28.11 RESPONSES TAB

28.11.1 The purpose of the 'Responses Tab' is to capture the participants' responses, or the estimated demand for the goods or services listed on the requisition.

28.11.2 Users are able to see all of the submitted responses.

28.11.3 When users have completed a response, they can view the response and edit it if needed.

Step	Demand Requisition View/Edit Responses Process Steps
1	Click ‘Edit Response’ – A new window will open to display the response.
2	Edit ‘Quantity’
3	Click ‘Save & Exit’ – Click ‘Close Window’ to exit without saving.

28.11.4 Aggregate Demand

Step	Demand Requisition Aggregate Demand Process Steps
1	Select the response(s) to be aggregated – Click ‘Select All’ to select all the responses.
2	Click ‘Aggregate Demand’ – After users aggregate the demand, users will be able to view the updated quantity with the total cost on the ‘Items Tab’ and ‘Summary Tab’ of the document.

28.12 ADDITIONAL TABS TO COMPLETE FOR DEMAND REQUISITION

Additional Tabs to Complete for Demand Requisition	
Tab Description	**Reference**
Address Tab	***Section 16, Address Tab – Common Tabs***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs***

28.13 SUMMARY TAB

28.13.1 The ‘Summary Tab’ provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

28.13.2 Once the document is submitted, users cannot edit the document.

28.13.3 Users are able to view the estimated cost and the item information from the aggregated demand.

Step	Demand Requisition Summary Tab Process Steps
1	Click ‘Submit for Approval’ – Once the requisition is submitted for approval, an ‘Approval Path’ section will display on the ‘Summary Tab’.

28.14 WORKFLOW DIAGRAM

Refer to ***Section 44.6, Demand Requisition Workflow Diagrams.***

29. CREATING A RECEIPT

29.1 GENERAL

29.1.1 *NevadaEPro* allows DA Users or BP Users to receive goods or services in *NevadaEPro*.

29.1.2 DA Users must be granted access to create receipt documents in *NevadaEPro*.

29.1.3 The purpose of receipts is to complete the second step of the three-way match.

29.1.4 Receipt types:

29.1.4.1 Receive
29.1.4.2 Return
29.1.4.3 Cancel
29.1.4.4 Receiving Adjustment
29.1.4.5 Return Adjustment
29.1.4.6 Cancel Adjustment

29.1.5 The three-way match concept stipulates that the amount (quantities, unit price, etc.) paid to a vendor matches the amount ordered and received. The match is intended to prevent paying incorrect or fraudulent invoices.

29.1.6 Receipts may be used to receive items, cancel items, or return items.

Step	PO Receipts Search
1	Click the ‘Plus (+) Icon’.
2	Click ‘Receipt’ in the dropdown to locate the PO.
3	Search using all or any criteria. Enter search criteria to locate a specific PO or leave the search criteria fields blank and click ‘Find It’ to return all PO types.
4	Click ‘Find It’.
5	The search will return results at the bottom of the page: a) Blanket Results will display ‘Release POs’ (orders from contracts). b) Open Market Results will display ‘Open Market POs’.
6	Click the ‘Radio Button’ next to the PO.
7	Click ‘Select’ at the bottom of the screen – Users can click ‘Exit’ to return to the ‘Homepage’.

29.2 CREATE A RECEIPT – HEADER INFORMATION

29.2.1 The purpose of the 'Header Information' is to capture general data for the specific document.

29.2.2 Much of the data is pre-populated from the PO.

Step	Create a Receipt Required Fields Process Steps
1	Choose Purchase Orders from the drop down in the Search bar, enter the last three (3) to four (4) numbers of the PO in the Search bar field. If it is an Open Market PO it will return that PO, if there are multiple releases from a Blanket PO, it will return multiple results.
2	Receipt Information Header. Click on 'Create Receipt'
3	Complete 'Required Fields' – Users must complete all 'Required Fields' marked with an asterisk (*) before saving the new document. Refer to ***Section 29.2.3, Required Field Descriptions for Creating a Receipt – Header Information.***
4	Click 'Save & Continue'.
5	Complete 'Protected Fields' – Refer to ***Section 29.2.4, Protected Field Descriptions for Creating a Receipt – Header Information.***
6	Complete 'Optional Fields' – Refer to ***Section 29.2.5, Optional Field Descriptions for Creating a Receipt – Header Information*** as preferred.
7	Click 'Save & Continue'.

29.2.3 Required Field Descriptions for Creating a Receipt – Header Information

REQUIRED FIELD DESCRIPTIONS FOR CREATING A RECEIVE – HEADER INFORMATION	
Field Name	**Functionality**
Receipt Description	Defaults to description of goods or services that are received or returned. Searchable in internal searches.
Department	Defaults to the originating department. Searchable in internal searches. May trigger approval paths.
Location	Defaults to the originating location. Searchable in internal searches. May trigger approval paths.
Receipt Owner	Defaults to BP User of PO. Searchable in internal searches. Should be edited to actual receipt of goods or services.

29.2.4 Protected Field Descriptions for Creating a Receipt – Header Information

PROTECTED FIELD DESCRIPTIONS FOR CREATING A RECEIPT – HEADER INFORMATION	
Field Name	**Functionality**
Receipt Number	Automatically numbers the receipt in sequential order and is searchable in internal searches.
Receipt Status	Initial status is set to 'In Progress' and will update after the receipt is submitted and if it is editable.
PO Number	Document number of related PO. Searchable in internal searches.
PO Status	Status of related PO. Searchable in internal searches.
User Created	Automatically generated. Used as an audit trail and for reporting.
Date Created	Automatically generated. Used as an audit trail and for reporting.
User Last Updated	Automatically generated. Used as an audit trail and for reporting.
Date Last Updated	Automatically generated. Used as an audit trail and for reporting.

29.2.5 Optional Field Descriptions for Creating a Receipt – Header Information

OPTIONAL FIELD DESCRIPTIONS FOR CREATING A RECEIPT – HEADER INFORMATION	
Field Name	**Functionality**
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Received Date	Automatically set to the current date. Date can be used to receive all items and selecting the 'Commit" link. Used as an audit trail and for reporting.

29.3 CREATING A RECEIPT - ATTACHMENTS

The purpose of the 'Attachment Tab' is to capture any supporting documentation regarding the receipt that may be helpful to other users, such as the approvers or auditors who have access to the document.

29.3.1 Files

Files are documents that are completed outside of *NevadaEPro*, saved and uploaded to the document.

29.3.2 Forms

Forms are documents that are completed electronically in *NevadaEPro* by the user and saved to the document.

29.3.3 Add an Attachment

Step	Add Attachment to a Receipt Process Steps
1	Click the ‘Plus (+) Sign’ next to ‘Files’ – Refer to ***Section 14.2, Add Attachments to an Individual Item.***

29.3.4 Delete an Attachment

Step	Delete an Attachment to a Receipt Process Steps
1	Click the ‘X’ next to the file – A warning message will display.
2	Click ‘OK’ – Users can click ‘Cancel’ to exit the window without deleting the attachment.

29.4 CREATING A RECEIPT – ITEM INFORMATION

29.4.1 The item information allows users to enter the quantity/dollar amounts of the item that was either received, returned, or cancelled.

29.4.2 Users can select to receive, return or cancel single items or all items on the document.

29.5 CREATING A RECEIPT - RECEIVING

The purpose of the receipt of an item is to document that the goods or services where delivered before a payment to the vendor is made.

29.5.1 Receive by Item

Step	Receive by Item Process Steps
1	Select the Item(s).
2	Select ‘Receive’ as the ‘Receipt Type’.
3	Select the ‘Received Date’ from the calendar icon.
4	Enter the ‘Quantity/Dollars Received’.
5	Enter a ‘Comment’ as needed.
6	Click ‘Save & Continue’.

29.5.2 Receive All Items

Step	Receive All Items Process Steps
1	Click ‘Receive All’ – a warning message will open.
2	Click ‘OK’ – Users can click ‘Cancel’ to exit out of the window without saving.

29.6 CREATING A RECEIPT - RETURNS

29.6.1 General

29.6.1.1 The purpose of the return is to exchange an item or quantity, due to damage when shipping or because the vendor shipped the wrong item.

29.6.1.2 When items are returned, users may receive it again, if applicable.

29.6.2 Return by Item

Step	Return by Item Process Steps
1	Select the Item(s).
2	Select ‘Return’ as the ‘Receipt Type’.
3	Enter the ‘Quantity/Dollars’.
4	Enter a ‘Comment’ as needed.
5	Click ‘Save & Continue’.

29.6.3 Return All Items

Step	Return All Item Process Steps
1	Enter a ‘Comment’.
2	Click ‘Return All’ – A warning message will open.
3	Click ‘OK’ – Users can click ‘Cancel’ to exit out of the window without saving.

29.7 CREATING A RECEIPT - CANCELLATIONS

29.7.1 General

29.7.1.1 The purpose of the cancelation is to remove item(s) from the original PO and will result in a change order reducing the total quantity of the Item on the PO.

29.7.1.2 Users may cancel an item if it is no longer needed.

29.7.1.3 Users can select to cancel the whole receipt document.

29.7.2 Cancel Item(s)

Step	Cancel Item(s) Process Steps
1	Select the 'Item(s)'.
2	Select 'Cancel' as the 'Receipt Type'.
3	Enter the 'Quantity/Dollars'.
4	Enter a 'Comment' as needed.
5	Click 'Save & Continue'.

29.7.3 Cancel All Items

Step	Cancel All Item(s) Process Steps
1	Enter a 'Comment'.
2	Click 'Cancel All' – A warning message will open.
3	Click 'OK' – Users can click 'Cancel' to exit out of window without saving.

29.8 CANCEL RECEIPT

Users can select to cancel the whole receipt document.

Step	Cancel Receipt Process Steps
1	Click 'Cancel Receipt' – A warning message will open.
2	Click 'OK' – Users can click 'Cancel' to exit out of the window without saving.
3	Users can return to the 'Summary Tab' of the PO to create a new receipt, if needed.

29.9 ADJUSTMENTS

29.9.1 The purpose of the adjustment is to allow users to back out any receipt, return or cancellation action users did on the 'Receipt'.

29.9.2 This may occur if users mistakenly enters the data for any reason.

Step	Adjustments Process Steps
1	Select the 'Receipt Type' for the adjustment – Users can select 'Receiving Adjustment', 'Return Adjustment' and 'Cancel Adjustment'.
2	Enter the ' Quantity/Dollars' – If users are reducing the quantity/dollars received, a negative quantity is entered, while a positive quantity will increase the quantity received.

Step	Adjustments Process Steps
3	Enter a ‘Comment’ – A comment is required for all adjustment actions.
4	Click ‘Save & Continue’.

29.10 CREATING A RECEIPT - NOTES

29.10.1 The ‘Notes’ on the receipt document capture internal notes regarding the document that may be reviewed by an approver or user in the future.

29.10.2 Users can add or delete notes.

29.10.3 Add Note(s)

Step	Add Note(s) Process Steps
1	Click the ‘Add Note’ icon in the upper right corner of the document – A new window will open to display the ‘Notes’ window.
2	Enter a ‘Note’.
3	Click the ‘Save’ Icon: a) Once users have created a ‘Note’ on the receipt document, a ‘Sticky Note’ Icon will appear next to the PO number at the top of the page. b) Users can click the ‘Sticky Note’ in order to view notes created by other agency users.

29.10.4 Edit Note(s)

Step	Edit Note(s) Process Steps
1	Click the ‘Add New Note’ Icon.
2	Click the ‘Pencil’ Icon.
3	Click the ‘Note’ in the ‘Text Box’.
4	Click the ‘Save’ Icon.

29.10.5 Delete Note(s)

Step	Delete Note(s) Process Steps
1	Click the ‘Add New Note’ Icon.
2	Click the ‘Trash Can’ Icon.

29.11 SUBMIT RECEIPT

Once users have reviewed the ‘Receipt’ document, users must submit the document for approval.

Step	Submit Receipt Process Steps
1	Click ‘Submit for Approval’.

29.12 WORKFLOW DIAGRAM

Refer to ***Section 44.7, Creating a Receipt Workflow Diagrams.***

30. CREATING AN INVOICE

30.1 GENERAL

30.1.1 *NevadaEPro* allows AP Users to create an invoice to initiate payment for purchased goods or services associated with a previously issued PO.

30.1.2 The purpose of invoices is to execute payment to vendors and complete the final step of the three-way match.

30.1.3 The three-way match concept stipulates that the amount (quantities, unit price, etc.) paid to a vendor matches the amount ordered and received. The match is intended to prevent paying incorrect or fraudulent Invoices.

30.1.4 In *NevadaEPro*, invoices may only be paid for items that have been ordered and received in *NevadaEPro.*

30.2 HOMEPAGE TO CREATE AN INVOICE

Step	Homepage to Create an Invoice Process Steps
1	Click the 'Plus (+) Icon'.
2	Click 'Invoice' in the dropdown to locate the PO – Only AP Users will have the ability to create and edit invoices.
3	Search using all or any criteria. Enter search criteria to locate a specific PO or leave the search criteria fields blank and click 'Find It' to return all PO types.
4	Click 'Find It'
5	The search will return results at the bottom of the page: a) Blanket Results will display 'Release POs' (orders from contracts). b) Open Market Results will display 'Open Market POs'.
6	Click the 'Radio Button' next to the PO.
7	Click 'Select' at the bottom of the screen – Users can click 'Exit' to return to the 'Homepage'.

30.3 GENERAL TAB – CREATING AN INVOICE

30.3.1 The purpose of the 'General Tab' is to capture header level data for the specific document.

30.3.2 Some of the data is pre-populated on the invoice from the PO.

Step	Creating an Invoice General Tab Process Steps
1	Complete ‘Required Fields’ – Users must complete all ‘Required Fields’ marked with an asterisk (*) before saving the new document. Refer to ***Section 30.3.3, Required Field Descriptions for Creating an Invoice – General Tab.***
2	Click ‘Save & Continue’.
3	‘Protected Fields’ – Refer to ***Section 30.3.4, Protected Field Descriptions for Creating an Invoice – General Tab.*** Fields that are pre-populated by the system. Note: All dates are calculated based on calendar days (not business days).
4	Complete ‘Optional Fields’ – Refer to ***Section 30.3.5, Optional Field Descriptions for Creating an Invoice – General Tab.***
5	Click ‘Save & Continue’.

30.3.3 Required Field Descriptions for Creating an Invoice – General Tab

REQUIRED FIELD DESCRIPTIONS FOR CREATING AN INVOICE – GENERAL TAB	
Field Name	**Functionality**
Invoice Number	Use the invoice number from the vendor. Searchable in internal searches. Once saved, the invoice number cannot be edited. When saving, *NevadaEPro* verifies that the invoice number has not been used previously by the vendor.
Invoice Description	Description of the goods or services for which users are paying the vendor. Should be descriptive and unique. Searchable in internal searches.
Invoice Date	Date that the invoice was physically received by AP Users or other personnel. Particularly important if prompt payment requirements are present.
Effective Date	Pre-populates to the current date. Recommended to use invoice date from the actual invoice received.
Payment Date	Pre-populates based on the invoice date and payment terms. Calculated to take advantage of any discounts based on payment terms. Used as an audit trail and reporting.
Advantage Link	‘Yes’ - The transaction is over $5,000.00 and/or meets the requirements of SAM 1552 and the funds must be pre-encumbered in Advantage. ‘No’ - The item is a direct purchase and the funds do not need to be pre-encumbered in Advantage.
Does this Vendor require a Separate Check?	Yes or No.
Paid via Billing Claim/Interagency Voucher?	Yes or No. Choosing YES will suppress the interface of the PV with Advantage and payment will not be issued to the vendor.

30.3.4 Protected Field Descriptions for Creating an Invoice – General Tab

PROTECTED FIELD DESCRIPTIONS FOR CREATING AN INVOICE – GENERAL TAB	
Field Name	**Functionality**
Invoice Status	Initial status is set to 'In Progress' and will update after the invoice is submitted and if the document is editable.
Invoice Type	Set to Three-Way Match or Two-Way Match. Invoice type is tied to the invoice method from the PO.
Payment Amount	Total amount of the invoice. Will not populate until invoice amount is entered and saved on the 'Items Tab'. Used as an audit trail and for reporting.
Payment Terms	Defaulted from the Vendor's preferred terms of payment terms on PO. Can be edited if Administrator has enabled user to edit terms. Applies to the total amount of the invoice. Used as an audit trail and for reporting.
Payment Discount	Defaulted from the payment terms on the PO. Applies to the total amount of the invoice. Used as an audit trail and for reporting.
Payment Terms Day	Defaulted from the payment terms on the PO. Applies to the total amount of the invoice. Used as an audit trail and for reporting.

30.3.5 Optional Field Descriptions for Creating an Invoice – General Tab

OPTIONAL FIELD DESCRIPTIONS FOR CREATING AN INVOICE – GENERAL TAB	
Field Name	**Functionality**
Handling Code	Used to instruct the State's financial system on how to handle the check.
Paid – BankID/Check	Information related to actual payment/voucher processing in the State's financial system; populated by 'Return Check File' utility when checks/vouchers/EFT payments are made. For AP Users and other personnel to identify when checks/vouchers/EFT payments were issued, final payment amounts, check numbers/EFT transaction codes.
Misc Amount	For entry of miscellaneous charges on invoice; available upon saving the 'General Tab'. Adds to invoice amount total. Used when unexpected charges by vendor are billed on an invoice.
Alternate ID	Used by the State's financial system to store indicators and is searchable.

30.3.6 Check In/Out

30.3.6.1 Users can check the invoice in or out to let other users know whether the invoice is locked and is being edited or unlocked and can be edited by other users.

30.3.6.2 Checked out means that users have locked down the document and no other users can edit it.

Step	Check In/Check Out an Invoice General Tab Process Steps
1	Click the 'Open Green Lock' to check out the document: a) Clicking the lock causes the 'Green Lock' to close, so other AP Users cannot edit the document while it is checked out. Status: 4ll - In Progress b) When other AP Users view the locked down Invoice, the Invoice will display who has checked out the document and the lock will be 'Red'. c) For AP Supervisors the 'Checked Out Invoice' displays as a closed 'Green Lock'. d) The user who 'Checked Out' the invoice can unlock or 'Check In' the invoice to make it accessible to other users. e) The exception for accessing the 'Checked Out Invoice' applies to AP Supervisors. f) To edit the locked Invoice, the AP Supervisor clicks the lock to 'Check in' or unlock the invoice. g) AP Supervisors can edit and work on any invoice.
2	Click 'Items Tab'.

30.4 ITEMS TAB – PAYING AN INVOICE

30.4.1 The purpose of the 'Items Tab' is to show all items and quantities that may be paid.

30.4.2 Invoices may be created even when a receipt is not present (to complete the three-way match); however, the invoice can be submitted but approvers will not be able to take any action until a receipt is entered that covers the amount of the Invoice.

Step	Items Tab – Paying an Invoice Process Steps
1	Enter the Invoice Amount: a) Users can click 'Pay All Items' to pay for all the items listed on the PO. b) If users select 'Pay All Items', a new window will open to let users know that the 'Invoice Amount' for each item will be set to the 'Permit to Pay' amount. c) If users need to process a partial payment, enter the amount to pay and click 'Save & Continue'. - ***Do not click 'Final Pay' on any partial payment***s.

Step	Items Tab – Paying an Invoice Process Steps
	d) Users should select 'Final Pay' if the invoice represents the final payment for the item(s) on the PO. If 'Final Pay' is not selected the PO will not be closed at the time the invoice is approved and will require the user to manually close the PO.
2	Click 'Save & Continue'.

30.5 SUBCONTRACTORS TAB – CREATING AN INVOICE

The purpose of the 'Subcontractors Tab' is to allow the AP User to record payments from the prime vendor to the subcontractor.

30.6 ACCOUNTS TAB – CREATING AN INVOICE

30.6.1 The 'Accounts Tab' displays the PO account codes that were pre-populated on the invoice and the amount allocated to each account code.

30.6.2 Users can change the account codes via the 'Change Order Tab'.

30.6.3 The 'Distribution Information Section' shows the distribution of funds for each item and allows the AP User to reallocate or re-distribute funds per item based on the amount of the item(s) users are invoicing. This is applicable when charges are split between different accounts or funding sources.

30.7 CREATING AN INVOICE ADDITIONAL TABS TO COMPLETE

Creating an Invoice Additional Tabs to Complete	
Tab Description	**Reference**
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs***

30.8 CHANGE ORDER TAB – CREATING AN INVOICE

The purpose of the 'Invoice Change Order Tab' is to update the accounting used to pay for the items on the invoice.

Step	Change Order Tab – Invoice Change Order Process Steps
1	Click 'Create Change Order'.

30.8.1 Items Tab/Accounting

The purpose of the ‘Items Tab/Accounting’ on the change order is to allow AP Users to update the accounting used to pay the items on the invoice with accounting applied from the ‘Header Level’ of the PO.

Step	Update to Header Accounting – Invoice Change Order Process Steps
1	Select the ‘Item Number’ to update – Users can select all Items by checking ‘Select’.
2	Click ‘Rebuild Selected from Header’: a) Users can select specific items to update the ‘Item Accounting’ to the ‘Header Level Accounting’. b) Users can also select all items to update all ‘Item Accounting’ to the ‘Header Accounting’.

Step	Update to Item Accounting – Invoice Change Order Process Steps
1	Select the Item.
2	Update the Accounting.
3	Click ‘Save Based on Percentages’: a) Users can select to ‘Save Based on Dollars’. b) Users can also copy the accounting from the ‘Header Accounting’ or from different items by choosing the ‘Item #’ or ‘Header’ from the dropdown and clicking ‘Copy’. c) Users can click ‘Reset’ to undo the changes to the accounting or click ‘Cancel & Exit’ to return to the ‘Items Tab’.
4	Click the ‘Accounting Tab’.

30.8.2 Change Order Accounting Tab – Creating an Invoice

30.8.2.1 The purpose of the ‘Accounting Tab’ on the Change Order is to allow AP Users to update the accounting used to pay items on the invoice at the item level.

30.8.2.2 New account codes may be added, and existing account codes may be modified or deleted.

Step	Update to Accounting – Invoice Change Order Process Steps
1	Update the ‘Accounting Tab’.

Step	Update to Accounting – Invoice Change Order Process Steps
2	Click 'Save Based on Percentages': a) Users can also 'Save Based on Dollars'. b) If users wish to 'Save Based on Dollars', the dollar amounts must be manually entered.
3	Click 'Rebuild for All Items' – Users can click 'Reset' to undo the changes to the accounting.

30.9 SUMMARY TAB – CHANGE ORDER ON INVOICE

The 'Change Order Summary Tab' allows users to provide reasons why the accounting was updated.

30.9.1 Apply the Change Order

Step	Apply the Change Order – Invoice Change Order Process Steps
1	Complete the 'Comments for the Whole Change Order'.
2	Review the changes.
3	Click 'Save & Continue': a) Click 'Save & Exit' to return to the 'Summary Tab' of the invoice document. b) There is not a separate approval for the change order on the invoice. ***Note: When a PO Change Order is applied, NevadaEPro will automatically generate a PO Change Order that updates the PO with the new/modified accounting from the Invoice Change Order. Thus, future invoices against the PO will be pre-populated with the new/modified account codes (if remaining amounts will be paid against the PO).***
4	Click 'Back to Invoice'.

30.9.2 Delete Change Order

Step	Delete the Change Order – Invoice Change Order Process Steps
1	Click 'Delete Change Order' – A new window will open to confirm that users want to delete the change order.
2	Click 'OK' a) Users can click 'Cancel' to exit out of the window without saving. b) Users can return to the change order to create another change order if needed.

30.10 SUMMARY TAB – CREATING AN INVOICE

30.10.1 The 'Summary 'Tab' provides an overview of all the information provided by the user on the previous tabs for review prior to submitting the document for approval.

30.10.2 Once the document is submitted, the user cannot edit the document.

Step	Summary Tab – Creating an Invoice Process Steps
1	Click 'Submit' – Users can click 'Cancel Invoice' to cancel the document. a) After the invoice has been submitted, it may enter AP workflows, approval paths (if they are present) or require approval by users with AP Supervisor privileges. b) If configured, AP Supervisors may be responsible for final approval of invoices. c) If the invoice does not pick up any AP workflows or approval paths, users may click 'Save & Continue' to auto-approve it.

30.11 PENDING RECEIPT INVOICES

30.11.1 If users are submitting an invoice for a PO that does not have a receipt present, the invoice will process differently than a 'normal' Invoice.

30.11.2 Once users submit the invoice, the invoice will enter AP workflows, if applicable.

30.11.3 After the invoice completes its AP workflows, *NevadaEPro* will display the approval paths (if any) to users.

30.11.4 In addition to invoices created by the agency, if the configuration has been enabled to allow vendors to create invoices, AP Users may process invoices, which are vendor-initiated and are pending receipts.

30.11.5 After users click 'Continue', the invoice will change from 'In Progress' status to 'Pending Receipt Status'.

30.11.6 While the invoice remains in 'Pending Receipt' users have the option to withdraw the invoice with pending receipts by clicking 'Withdraw' at the bottom of the 'Summary Tab'.

30.11.7 When users withdraw the invoice, the invoice will return to 'In Progress' and be editable.

30.11.8 The invoice will remain in 'Pending Receipt' status until a receipt has been submitted for the PO.

30.11.9 The document will not enter its approval paths until a receipt has been submitted for the PO (Note: Date Requested in the ‘Approval Paths Section’ is blank).

30.11.10 Once a receipt has been submitted, the invoice will change from ‘Pending Receipt’ status to ‘Ready for Approval’.

30.11.11 The approver will be notified and the ‘Date Requested’ will display on the invoice.

30.11.12 The approvers will process the invoice as applicable.

30.12 WORKFLOW DIAGRAM

Refer to ***Section 44.8, Creating an Invoice Workflow Diagram.***

31. CREATING A BID

31.1 GENERAL

31.1.1 *NevadaEPro* allows DA Users, if granted access and BP Users to create a bid.

31.1.2 The purpose of a bid is to publish a solicitation for goods and/or services to the public to allow vendors to respond electronically as well as the ability to evaluate and award vendor responses.

31.1.3 The bid is used to accommodate a wide variety of solicitation types including: Invitations to Bid (ITBs), Requests for Proposals (RFPs), Requests for Information (RFIs), Requisitions for Qualifications (RFQs) and others.

Step	General Creating a Bid Process Steps
1	Click the ‘Plus (+) Icon’.
2	Click ‘Bid Solicitation’ in the dropdown.
3	Select ‘Create a Bid from Scratch’ – Users can choose to clone a bid from another document.
4	Click ‘Continue’ – Select ‘Cancel & Exit’ to exit out of the page and return to the ‘Homepage’.

31.2 GENERAL TAB

31.2.1 The purpose of the ‘General Tab’ is to capture header level data for the specific document.

31.2.2 Each document template is blank when created from scratch.

31.2.3 Users must complete the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

Step	Creating a Bid General Tab Process Steps
1	Complete Required Fields – Users must complete all required fields marked with an asterisk (*) on the ‘General Tab’, including custom columns that have additional responses required, before saving the new document. Refer to ***Section 31.2.4, Required Field Descriptions for Creating a Bid - General Tab***.
2	Click ‘Save & Continue’ - Once the user saves the document, protected fields are auto-filled. The document will now be searchable in *NevadaEPro* by an authorized user, including from the user's Homepage. Refer to ***Section 31.2.5, Protected Field Descriptions for Creating a Bid - General Tab***.
3	Complete Optional Fields, as preferred. Refer to ***Section 31.2.6, Optional Field Descriptions for Creating a Bid - General Tab***.

Step	Creating a Bid General Tab Process Steps
4	Click ‘Save & Continue’.
5	Click ‘Items Tab’.

31.2.4 Required Field Descriptions for Creating a Bid - General Tab

REQUIRED FIELD DESCRIPTIONS FOR CREATING A BID – GENERAL TAB	
Field Name	**Functionality**
Description	Description of the goods or services to be procured. Searchable in internal and external searches.
Purchaser	Dropdown of BP Users in organization. Allows user to assign a new purchaser if the original BP User cannot complete the bid.
Department	Originating department of the document. Ship-To and Bill-To addresses are made available based on the department selected. Configured to trigger approval paths.
Location	Originating location of the document. Searchable in internal searches. Configured to trigger approval paths.
Bid Opening Date	Date and time when bid will be opened, and vendors can no longer submit quotes.
Available Date	Date and time when bid will be available for vendors to submit quotes.
Purchase Method	Dropdown: Open Market or Blanket. Blanket allows user to enter the begin and end dates on the bid. For indefinite quantity over multiple years, Master Blanket is typically selected.
Print Format	Populated with default print form. Bid print includes internal information (e.g., accounting information). Vendor print is for external use. Determine which version of the print form is generated when user clicks print. Recommended to not print bids.

31.2.5 Protected Field Descriptions for Creating a Bid - General Tab

PROTECTED FIELD DESCRIPTIONS FOR CREATING A BID – GENERAL TAB	
Field Name	**Functionality**
Bid Number	Automatically generated upon the first save. Searchable in internal and external searches. Configured to reflect the originating organization or department, document fiscal year and sequential number.
Status	Initial status is set to ‘In Progress’ and will update as the bid is processed and if the document is editable.
Fiscal Year	Identify the accounting fiscal year of the document.

PROTECTED FIELD DESCRIPTIONS FOR CREATING A BID – GENERAL TAB	
Field Name	**Functionality**
Organization	Originating organization of the document. May be used to trigger approval paths. Certain status of the document may not be visible by other organizations.
Date Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.
Solicitation Enabled	Indicates that the bid is the result of a solicitation enabled release. The resulting spend from the bid is tied to an MBPO. The bid is used as a secondary competition off of an established MBPO.

31.2.6 Optional Field Descriptions for Creating a Bid - General Tab

OPTIONAL FIELD DESCRIPTIONS FOR CREATING A BID – GENERAL TAB	
Field Name	**Functionality**
How Solicitated	Dropdown list of how vendors will be notified of bid opportunities.
Type Code	***Note: Functionality is not configured in NevadaEPro.***
Show on Web	Visible to public if checked. Show on website, unless procurement is of a sensitive nature.
Allow Electronic Response	Checkmark to allow vendors to submit electronic quotes through *NevadaEPro.*
Required Dates	Date when services or goods are needed. Often used for commodity bids.
Purge Date	***Note: Documents will not be purged from NevadaEPro in order to retain an audit trail of all transactions.***
Bid Type	Dropdown option of open or closed - defaults to open bid. Open bids are available for quotes by all vendors. Closed bids are only available for quotes by vendors listed on the 'Bidders Tab'. Formal bids are open to ensure open and fair competition. Informal bids may be closed.
Informal Bid	Checkmark to select bid to be informal bid. If informal bid, user can view quotes as they are submitted by vendors. Frequently used for bids that fall below the formal bid threshold.
Control Code	***Note: Functionality is not configured in NevadaEPro.***
Estimated Cost	Editable field to enter estimated total cost of bid. Defaults to calculated amount once items and pricing are entered. Configured to trigger approval paths.
Print Dest. Detail	Dropdown list of print destinations.

OPTIONAL FIELD DESCRIPTIONS FOR CREATING A BID – GENERAL TAB	
Field Name	**Functionality**
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***
Item Single Award Only	Checkmark to select if items must be awarded to one (1) single vendor. BP User will not be able to award line items to multiple vendors.
Allow Vendors to Submit Multiple/Alternate Quotes	Checkmark to allow vendors to submit multiple quotes. Vendors can submit multiple quotes before the bid opening date.
Pre-Bid Conference	Comment field to include pre-bid conference information, if applicable. Visible to vendors and the public.
Bulletin Desc	Comment field to add additional text to vendor notification email. Visible to vendors notified of the bid by email.
Quote Notification	If checked, user will receive an email when each vendor submits a quote.

31.3 ITEMS TAB/GENERAL SUBTAB

31.3.1 The purpose of the 'Items Tab/General Subtab' is to capture what goods or services users are procuring.

31.3.2 Users may add items using one (1) of two (2) methods:

31.3.2.1 Search and add existing items; or
31.3.2.2 Add new items from scratch.

31.3.3 Users can also delete items.

31.3.4 Refer to ***Section 10, Items Tab/General Subtab – Common Tabs***. Note: The use of three (3) item fields (when they appear on bids) is unique to this document type and are identified in the table below.

UNIQUE ITEM FIELD DESCRIPTIONS – BID ITEMS	
Field Name	**Functionality**
Disable Pricing on Quote	If checked, vendors will not be able to enter pricing on their quote and should attach pricing.
UOM	Unit of measure for item. Visible externally and to vendors. Cannot be updated by vendor. However, it will allow vendors to provide alternate UOM in alternate description of quote, if applicable.
Discount %	Discount % for items. Discount % will change the total cost of item. Typically not entered by the BP User to estimate cost, however, may be used by vendor on the bid response.

31.4 CREATING A BID - ADDITIONAL TABS TO COMPLETE

Creating a Bid – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/Address Subtab	***Section 12, Items Tab/Address Subtab – Common Tabs***
Items Tab/Accounting Subtab	***Section 13, Items Tab/Accounting Subtab – Common Tabs***
Items Tab/Attachments Subtab	***Section 14, Items Tab/Attachments Subtab – Common Tabs***
Items Tab/Notes Subtab	***Section 15, Items Tab/Notes Subtab – Common Tabs***
Note: Refer to Section 31.6 for additional tabs to complete.	

31.5 ITEMS TAB/QUESTIONS SUBTAB

31.5.1 The purpose of the ‘Items Tab/Questions Subtab’ is to ask vendors questions that will be part of the vendor's electronic response regarding the item.

31.5.2 This functionality is typically used when a BP User needs to collect compliance and/or product level information on a particular item (e.g., Does your product comply with the State's green initiative?).

31.5.3 Users can choose to require vendors to answer the question or make the question optional.

31.5.4 If a question applies to all items on the document, it should be created on the ‘Questions Tab’.

31.5.5 Users can add questions to an individual item by following the steps below:

<table>
<tr><th>Step</th><th colspan="2">Add Questions to an Individual Item Process Steps</th></tr>
<tr><td>1</td><td colspan="2">Click the ‘Item #’.</td></tr>
<tr><td>2</td><td colspan="2">Enter question information in the box – Users have a 255 character limit for each question.</td></tr>
<tr><td rowspan="3">3</td><td colspan="2">Select a ‘Response Type’ from the dropdown based on the response types noted below:</td></tr>
<tr><td>Response Type Name</td><td>Responses Available to Vendor</td></tr>
<tr><td>Availability Response</td><td>Fully Provided; or
Not Provided; or
Custom Development Required; or
Provided with Modifications; or
Provided with Reporting/Development Tool.</td></tr>
</table>

<table>
<tr><th>Step</th><th colspan="2">Add Questions to an Individual Item Process Steps</th></tr>
<tr><td rowspan="7"></td><td>Average Rating – Poor to Excellent</td><td>Poor; or
Below Average; or
Average; or
Above Average; or
Excellent.</td></tr>
<tr><td>Comment Response – extended text</td><td>Open text box – 4,000 characters</td></tr>
<tr><td>Rating Scale from 1 to 10</td><td>Can enter any number from 1 to 10</td></tr>
<tr><td>Rating Scale from 1 to 5</td><td>Can enter any number from 1 to 5</td></tr>
<tr><td>Basic Text Response</td><td>Open text box – 4,000 characters</td></tr>
<tr><td>True or False Response</td><td>Can enter either true or false</td></tr>
<tr><td>Yes or No Response</td><td>Can enter either yes or no</td></tr>
<tr><td>4</td><td colspan="2">Complete Optional Fields, as preferred:

a) If users select the ‘Required’ checkbox, then vendors must answer the question before submitting their quote.

b) The ‘Print Sequence’ allows users to reorder the questions.</td></tr>
<tr><td>5</td><td colspan="2">Click ‘Save & Exit’.

a) Click ‘Reset’ to erase all information entered in the ‘Question’ field box prior to clicking ‘Save & Continue’.

b) A plus sign (+) displays next to the ‘Item #’ indicating a question exists for that item.

c) Any question may be deleted after being saved.</td></tr>
<tr><td>6</td><td colspan="2">Click the plus sign (+) next to the Item # - This will allow users to view the question(s) for an individual item.</td></tr>
<tr><td>7</td><td colspan="2">Review the question(s) for an item – Users can delete questions for specific items from here by clicking ‘Select Question’ and then ‘Delete Selected Questions’. To edit the item, click the ‘Item #’.</td></tr>
</table>

31.5.6 Copy Selected Questions to Selected Items

Users can copy questions that were added to one (1) item to other items on the bid by following the steps below:

Step	Copy Selected Questions to Selected Items Process Steps
1	Click the ‘Plus (+)’ next to the ‘Item #’.
2	Select the ‘Select Question’ Checkbox – Users select the checkbox of the question to copy.
3	Select the ‘Select Item(s)’ Checkbox – Users select the item(s) where the question will be copied.
4	Click ‘Copy Selected Questions to Selected Items’ – Example: Copy question from item #1 to item #3. Click ‘Reset’ to undo the copy action.

31.5.7 Add Questions to Selected Items

Users can add one (1) question to multiple items by selecting the items first.

Step	Add Questions to Selected Items Process Steps
1	Select the Items.
2	Enter the question and select ‘Required’, if applicable.
3	Select the ‘Response Type’.
4	Click ‘Apply to Selected Items’.

31.5.8 Delete Questions for an Individual Item

Users can delete questions for an individual item or delete all questions associated to an individual item.

Step	Delete Questions for an Individual Item
1	Click the ‘Item #’.
2	Select the question under ‘Delete’ – Users can select all questions for the item by selecting ‘Delete All’.
3	Click ‘Save & Continue’: a) Click ‘Save & Exit’ to return to the previous page. b) Click ‘Reset’ to undo the delete action or click ‘Cancel & Exit’ to return to the previous page.
4	Click ‘Address Tab’.

31.6 ADDITIONAL TABS TO COMPLETE FOR CREATING A BID

Additional Tabs to Complete for Creating a Bid	
Tab Description	**Reference**
Address Tab	***Section 16, Address Tab – Common Tabs***
Accounting Tab	***Section 17, Accounting Tab – Common Tabs***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs***

31.7 BIDDERS TAB/GENERAL SUBTAB

The purpose of the ‘Bidders Tab/General Subtab’ is to select vendors that will receive notification of the bid. All vendors will be able to respond to an open bid.

Step	Add Vendors Process Steps
1	Click ‘Lookup & Add Vendors’ – A new window will open.
2	Enter data into search fields and click ‘Find It’ – Users can also click ‘Find Vendors for All Commodity Codes’ on the bid without entering any search criteria to add Vendors who registered with NIGP Code(s) that match the NIGP Code(s) listed on the bid items.
3	Select the vendor(s).
4	Click ‘Save & Exit’ at the bottom of the screen – Click ‘Save & Continue’ to continue searching for and adding vendors.
5	Complete Optional Fields as preferred per ***Section 31.7.1, Optional Field Descriptions for Bidders Tab/General Subtab***.
6	Click ‘Save & Continue’.

31.7.1 Optional Field Descriptions for Bidders Tab/General Subtab

OPTIONAL FIELD DESCRIPTIONS – BIDDERS TAB/GENERAL SUBTAB	
Field Name	**Functionality**
Unrestricted Bid	Bid will show in open bids section on login page and all registered vendors can view and respond.
Restricted Bid	Bid will only show in open bids section for vendors selected on the ‘Bidders Tab’. Used when procuring goods/services that are sensitive or when the vendor pool is limited.

OPTIONAL FIELD DESCRIPTIONS – BIDDERS TAB/GENERAL SUBTAB	
Field Name	**Functionality**
Show Unit Prices to Vendors	If checked, vendors will see unit prices on bid. Rarely used for formal solicitations.
Hide Bid Holder List	If checked, the 'Bidders Tab' is not visible externally or to vendors.

31.8 DELETE VENDORS

Users can delete selected vendors or all vendors on the 'Bidders Tab'.

Step	Delete Vendors Process Steps
1	Select the checkbox in the 'Delete' column associated with the vendor(s) to delete – Select 'Delete All' to select all vendors on 'Bidders Tab'.
2	Click 'Save & Continue'.
3	Click 'Bidders Tab/Subcontractors Tab'.

31.9 BIDDERS TAB/SUBCONTRACTORS SUBTAB

The purpose of the 'Bidders Tab/Subcontractors Subtab' is to identify any subcontractor participation requirement and related participation data for the bid.

31.9.1 Add a Subcontractor Goal

Step	Add a Subcontractor Goal Process Steps
1	Select category from 'Vendor Category' dropdown – Vendor categories are unique and are used to capture information about each vendor.
2	Enter the 'Target Percent'.
3	Complete Optional Fields as preferred. Refer to ***Section 31.9.2, Optional Field Descriptions for Bidders Tab/Subcontractor Subtab.***
4	Click 'Save & Continue': a) Click 'Save & Exit' to save the changes and return to the 'Summary Tab'; or b) Click 'Cancel & Exit' to not save the changes and return to the 'Summary Tab'; or c) Select 'Reset' to erase all entered information.

31.9.2 Optional Field Descriptions for Bidders Tab/Subcontractor Subtab

OPTIONAL FIELD DESCRIPTIONS – BIDDERS TAB/SUBCONTRACTOR SUBTAB	
Field Name	**Functionality**
Text box to designate the need for subcontractors	Free form field to describe subcontractor requirements. Visible to vendors. Allows purchaser to provide instructions to vendors to complete the subcontractor requirements.
Subcontractors must be certified in at least one (1) bid item NIGP Code	Check to require subcontractors to be registered with one (1) NIGP Code on the bid items. Subcontractors must be registered within *NevadaEPro* to be certified in NIGP Code(s). Allows restrictions of which subcontractors that may be added by vendor to quote.
Subcontractors must acknowledge inclusion	Check to require subcontractors to contact agency in the event of inclusion. Subcontractors must be registered within *NevadaEPro* to acknowledge inclusion. Ensures that subcontractors have an agreement to participate in prime vendor's quote.
Hours from bid closing for subcontractors to acknowledge inclusion	Hours before bid closing that subcontractors have to contact the agency of inclusion. Visible to vendors.
Mandatory	Vendors are required to list a subcontractor on the quote. Subcontractors must be registered in *NevadaEPro* to be added to a quote.
Category Certified Vendors only	Check to make subcontractors certify they meet category requirements. Subcontractors must be registered in *NevadaEPro* to acknowledge inclusion.

31.9.3 Delete a Subcontractor Goal

Step	Delete a Subcontractor Goal Process Steps
1	Select the 'Delete' checkbox associated with the vendor category to delete.
2	Click 'Save & Continue'.
3	Click 'Bidders Tab/Quote Activity'.

31.10 BIDDERS TAB/QUOTE ACTIVITY SUBTAB

31.10.1 The purpose of the 'Bidders Tab/Quote Activity Subtab' is to show users when vendors have submitted quotes.

31.10.2 The 'Bidders Tab/Quote Activity Subtab' will show the date and time when a vendor submits an electronic quote. It will also show users when a quote has been withdrawn or withdrawn and resubmitted.

31.11 BIDDERS TAB/BIDSYNC VENDORS SUBTAB

31.11.1 The purpose of the 'Bidders Tab/BidSync Vendors Subtab' is to increase the bidder pool for the bid through the BidSync supplier network, which increases competition.

31.11.2 Vendors that are added to the bid will receive a notification when the bid is sent; however, they must register in *NevadaEPro* in order to submit a quote.

31.11.3 If the bid is informal, users may also view vendor quotes on the 'Bidders Tab' during the bidding period.

31.11.4 The 'Bid Tabulation' cannot be generated until the 'Bid Opening Date/Time' has passed; however, individual quotes may be opened and viewed from this page.

31.11.5 Quotes on formal bids are electronically locked in *NevadaEPro* until the 'Bid Opening Date/Time' and may not be viewed until that milestone has passed.

31.11.6 Add BidSync Vendors

Step	Add BidSync Vendors Process Steps
1	Click 'Bidders Tab/BidSync Vendors'.
2	Click Lookup BidSync Vendors – A new window will open.
3	Enter data into search fields.
4	Click 'Search': a) Select 'Clear' to clear the entered information. b) Typically, users enter criteria such as classification codes (e.g., NIGP codes), city names, or zip codes to locate additional vendors in their area that provide the goods or service associated with the bid.
5	Click 'Add and Close' – Select 'Add and Continue' to add additional vendors.
6	Click 'Save & Continue'.

31.11.7 Delete BidSync Vendors

Step	Delete BidSync Vendors Process Steps
1	Select the 'Delete' checkbox associated with the vendor(s) to delete – Select 'Delete All' to delete all the BidSync vendors.
2	Click 'Save and Continue'.

31.12 QUESTIONS TAB

31.12.1 The purpose of the ‘Questions Tab’ is to ask vendors questions that will be part of the vendor's electronic response to the bid document.

31.12.2 Users can choose to require the vendor to answer the question(s) or make the question(s) optional.

31.12.3 Users may also capture questions for individual items on the ‘Items Tab/Questions Subtab’.

Step	Add Question(s) for All Items Process Steps
1	Enter the question information in the box.
2	Select a ‘Response Type’ from the dropdown.
3	Complete ‘Optional Fields’ as preferred: a) Users can make the question required for the vendor. b) If a question is required, the vendor will not be able to submit their quote until a response to the question is entered.
4	Click ‘Save & Continue’: a) Click ‘Reset’ to erase all information entered in the question field box, prior to clicking ‘Save & Continue’. b) Any question may be deleted after being saved.

31.12.4 Delete Question(s) for all Items:

Step	Delete Question(s) for All Items Process Steps
1	Select the question under the ‘Delete’ Column – Select ‘Delete All’ to delete all questions associated with the whole document.
2	Click ‘Save & Continue’ – Click ‘Reset’ to undo the delete action.

31.13 AMENDMENTS TAB

31.13.1 The purpose of the ‘Amendments Tab’ is to capture any changes to the bid after it has been sent and before the ‘Bid Opening Date’.

31.13.2 The ‘Amendments Tab’ will only become available to users after the bid is approved and sent (refer to ***Section 32, Creating a Bid Amendment).***

Step	Amendments Tab Process Steps
1	Click ‘Q&A Tab’: a) The ‘Q&A Tab’ allows for dialogue between the vendor community and users. b) Users can allow the vendor to submit questions about the bid once the bid is sent and posted online.

31.13.3 Turn on Q&A

Step	Q&A Process Steps
1	Select ‘Allow Vendor to Submit Questions’: a) Users can select to receive notification when vendors submit questions. b) Users can return to the ‘Q&A Tab’ at any time to turn off the Q&A. c) Users do not need to create a bid amendment to turn off Q&A; however, turning off Q&A cannot be scheduled automatically within *NevadaEPro*. Setting a reminder to turn off Q&A is recommended.
2	Complete Optional Fields, as preferred (refer to ***Section 31.13.4, Optional Field Descriptions - Q&A Process***).
3	Click ‘Save & Continue’ – Click ‘Reset’ to undo the action.

31.13.4 Optional Field Descriptions – Q&A Process

OPTIONAL FIELD DESCRIPTIONS – Q&A PROCESS	
Field Name	**Functionality**
Question Support	Free field text for subject of question. Viewable externally and to vendors.
Question	Free field text for question. Viewable externally and to vendors.
Answer	Free field text for answer. Viewable externally and to vendors.
Show All on Web	Check to make viewable to all vendors.
Show Original Vendor Only	Check to only make the question or answer viewable to the individual vendor that asked the question.
Send notification when Vendor submitting question	If checked, *NevadaEPro* will send an email to user.

31.13.5 Protected Field Descriptions – Q&A Process

Users cannot update the following protected fields.

PROTECTED FIELD DESCRIPTIONS – Q&A PROCESS	
Field Name	**Functionality**
Question #	Sequential question number as it is assigned.
Created Date	Date user created question(s). Used as an audit trail.
User Created	User who created the question(s). Used as an audit trail.

31.13.6 Delete Q&A

Step	Delete Q&A Process Steps
1	Select the 'Delete' checkbox associated with the question to delete – Users can 'Delete All' to delete all Q&A.
2	Click 'Save & Continue' – Click 'Reset' to undo the delete action.

31.14 REMINDERS TAB

Refer to ***Section 22, Reminders Tab – Common Tabs***.

31.15 SUMMARY TAB

31.15.1 The 'Summary Tab' provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

31.15.2 Once the document is submitted, users cannot edit the document.

Step	Summary Tab Process Steps
1	Scroll to the bottom of the 'Summary Tab'.
2	Click 'Submit for Approval'.

31.16 SENDING THE BID

31.16.1 Once the bid is approved, it must be 'Sent' by the user in order for it to post and be available for vendors to respond.

31.16.2 When all approvals have been completed, a new 'Send Bid' button will appear at the bottom of the 'Summary Tab' of the bid.

Step	Sending the Bid Process Steps
1	Click the ‘Summary Tab’.
2	Select the ‘Send Bid’ action option – Users have the option to notify the vendors or to only change the status to ‘Sent’.
3	Click ‘Send Bid’.
4	Click ‘OK’ – If users select to notify vendors, the email recipients display on the ‘Vendor Notification Result Page’.

31.17 WORKFLOW DIAGRAM

Refer to ***Section 44.9, Bid Solicitation Workflow Diagram.***

31.18 OPENING AND EVALUATING THE BID RESPONSES

31.18.1 After the Bid Opening Date/Time has passed, users can open the bid and access the ‘Bid Tabulation’.

31.18.2 The ‘Bid Tabulation’ is a feature in *NevadaEPro* that allows users to view vendor quotes and provides a number of features to evaluate and award the bid, including scoring and online quote revisions.

31.18.3 Refer to ***Section 33, Opening and Tabulating the Bid Responses – Bid Tab***.

31.19 SUMMARY TAB

31.19.1 The ‘Summary Tab’ provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

31.19.2 Once the document is submitted, users cannot edit the document.

Step	Create Purchase Order (PO) Process Steps
1	Once all approvals have been applied, click ‘Create PO’.
2	Click ‘Continue’: a) A PO will be created for each vendor with links to the other PO on the ‘Summary Tab’ of the ‘Bid Tabulation’ as well as the ‘Summary Tab’ on the bid document. b) Click ‘Cancel & Exit’ to return to the previous page.
3	Click the PO link to view ‘In Progress’ release POs.

31.20 GENERAL TAB (RELEASE PURCHASE ORDER)

31.20.1 After users create the PO from the approved award from the 'Bid Tabulation', users can process the release PO for each awarded vendor, if applicable.

31.20.2 Refer to ***Section 41, Creating a Standard Release Purchase Order (PO).***

32. CREATING A BID AMENDMENT

32.1 GENERAL

32.1.1 The purpose of the bid amendment is to modify the bid after the bid is sent to vendors.

32.1.2 Common reasons to create a bid amendment are to:

32.1.2.1 Change available date; or
32.1.2.2 Change bid opening date; or
32.1.2.3 Modify items on the bid.

32.1.3 The following sections show all tabs available on the bid and what can and cannot be updated using the bid amendment.

Step	Creating a Bid Amendment Process Steps
1	Click the ‘Amendments Tab’.
2	Click ‘Create Bid Amendment’- Not all fields may be updated using the amendment.

32.2 GENERAL TAB – BID AMENDMENT

The ‘General Tab’ can be updated using the bid amendment.

Step	Bid Amendment General Tab Process Steps
1	Update fields as preferred - The only fields on the ‘General Tab’ that can be modified are noted below: a) Purchaser; b) Show on Web; c) Allow Electronic Response; d) Bid Opening Date; e) Available Date; f) Estimate Cost; g) Info Contact; and h) Pre-Bid Conference.
2	Click ‘Save & Continue’.

32.3 ITEMS TAB/GENERAL SUBTAB – BID AMENDMENT

32.3.1 The ‘Items Tab/General Subtab’ can be updated using the bid amendment.

32.3.2 The ‘Items Tab/General Subtab’ shows users the items listed on the document.

32.3.3 Users can add additional items or update or delete existing items on the bid.

32.4 ITEMS TAB/ATTACHMENTS SUBTAB – BID AMENDMENT

32.4.1 The ‘Items Tab/Attachment Subtab’ can be updated using the amendment.

32.4.2 The ‘Items Tab/Attachments Subtab’ displays to users the attachments associated with individual items.

32.4.3 Users are able to add additional files, update or delete existing files for the individual item.

32.5 ATTACHMENTS TAB – BID AMENDMENT

Users can add additional files or update or delete existing files.

32.5.1 Files

32.5.1.1 Files are documents that are completed outside of *NevadaEPro*, saved, and uploaded to the document.

32.5.1.2 Users may add new files, update the description, set the Attachment to display to the Vendor when the Bid is posted, reorder the files and delete files.

32.5.2 Forms

Forms are documents that are completed electronically in *NevadaEPro* by users and saved to the document.

32.6 SUMMARY TAB – BID AMENDMENT

Users can update the ‘Summary Tab’ for the Bid Amendment.

Step	Amendment Summary Tab Process Steps
1	Complete the comments for the whole bid amendment: a) The ‘Summary Tab’ displays the detail of all changes made to the bid through the bid amendment. b) If the ‘Show to Vendor’ checkbox is checked, vendors will be notified of all the changes in the bid amendment in the notification email that is sent when the bid amendment is applied. c) In addition, users may create comments for the whole bid amendment as well.
2	Click ‘Save & Continue’.
3	Click ‘Apply Bid Amendment’ – Users can ‘Delete Bid Amendment’ to delete the amendment and not apply it to the bid.

Step	Amendment Summary Tab Process Steps
4	Click ‘OK’ on the ‘Vendor Notification Result Page’ – Users will be able to view all the email recipients of the bid amendment.
5	View Amendments from ‘Amendments Tab’: a) Users can view all bid amendments including ‘In Progress’ and ‘Sent Amendments’ on the ‘Amendments Tab’. b) Users can view each individual bid amendment by clicking on the bid amendment #.

33. OPENING AND TABULATING THE BID RESPONSES – BID TAB

33.1 GENERAL

33.1.1 After the ‘Bid Opening Date/Time’ has passed, users can open the bid and access the ‘Bid Tabulation’.

33.1.2 The ‘Bid Tabulation’ is a feature in *NevadaEPro* that allows users to view vendor quotes and provides a number of features to evaluate and award the bid, including scoring and online quote revisions.

33.2 OPENING AND TABULATING BID RESPONSES

Step	Opening and Tabulating Bid Responses Process Steps
1	Click the ‘Bid Solicitation(s) Ready to Open’ actionable status box.
2	Click the ‘Bid Solicitation #’ – Users may click the arrows to view more pages of bids in ‘Ready to Open’ status.
3	Click ‘Open Bid’ – The ‘Open Bid’ button is located at the bottom of the ‘Summary Tab’.
4	Click ‘Bid Tab’ – The ‘Bid Tab’ button is located at the bottom of the ‘Summary Tab’.

33.3 QUOTES TAB

33.3.1 The ‘Quote Tab’ of the ‘Bid Tabulation’ allows users to:

33.3.1.1 View submitted quotes;
33.3.1.2 Download attachments form each vendor’s quote;
33.3.1.3 Manually enter a quote on behalf of a vendor; and
33.3.1.4 Select each quote for consideration.

33.3.2 Review Individual Quotes

The user may review vendors quotes individually.

Step	Review Individual Quotes Process Steps
1	Click the ‘Quote #’ – A new window will open. Users may: a) Review the ‘Quote Summary’; b) Download attachments individually; or c) Review each tab separately.
2	Click through the quote tabs to review the contents.

33.3.3 Create a Reminder on Quote

Refer to ***Section 22, Reminders Tab – Common Tabs***.

33.3.4 Download Attachments Individually from Quote:

Step	Download Attachments Individually from Quote Process Steps
1	Click ‘Attachments Tab’.
2	Click the ‘File’: a) The file will download on the user’s computer. b) Click ‘View Details’ to review the file details and click the download icon to download the attachment. c) Users can mark attachments as confidential so that external users will not be able to view them.
3	Click ‘Close Window’.

33.3.5 Download all Quote Attachments

Users may download all Attachments for each Vendor Quote into a zip file.

Step	Download All Attachments from Quote Process Steps
1	Click the ‘Quotes Tab’.
2	Click ‘Download’ under ‘Attachments’ – The file will appear in the bottom corner of the screen for users to open.

34. CREATE NEW QUOTE – ENTER ON VENDOR'S BEHALF

34.1 GENERAL

34.1.1 Users will sometimes receive vendor quotes via email or in hardcopy form from vendors.

34.1.2 In these instances, users may wish to enter the quote received outside of *NevadaEPro* for a proper side-by-side comparison with the other quotes received, to ensure a fair and equitable process and to ensure a proper audit trail.

Step	Create New Quote – Enter on Vendor's Behalf Process Steps
1	Click 'Create New Quote' – the page will refresh to the 'General Tab' of a blank quote document.
2	Complete Required Fields on 'General Tab'. User must complete all required fields, marked with an asterisk (*). Refer to ***Section 34.2, Required Field Descriptions – Create New Quote*** for those fields that must be completed.
3	Click 'Save & Continue'.

34.2 REQUIRED FIELD DESCRIPTIONS – CREATE NEW QUOTE

REQUIRED FIELD DESCRIPTIONS – CREATE NEW QUOTE	
Field Name	**Functionality**
Description	Defaults to description of the goods or services on which the vendor is bidding. Users may edit, if needed. Searchable in internal and external searches.
Vendor	The vendor for whom users are creating the quote. Use dropdown if available or search for vendor.

34.3 REVIEW HEADER QUESTIONS TAB

Step	Review Header Questions Process Steps
1	Click 'Header Questions Tab' to review vendor responses and determine if a quote may be deemed nonresponsive (e.g., the vendor does not meet certain compliance requirements).

34.4 REVIEW SUBCONTRACTORS TAB

The purpose of the 'Subcontractors Tab' is to provide a summary view of the information submitted by the vendors for their subcontractors.

Step	Review Subcontractors Tab Process Steps
1	Click ‘Subcontractors Tab’ - In certain cases when subcontractors are required on the bid, users may quickly identify vendor quotes that are deemed unresponsive from the information provided on the ‘Subcontractors Tab’.

34.5 SELECT QUOTES TO CONSIDER

34.5.1 Once users have reviewed the quotes, attachments, answers to questions and subcontractors, certain quotes may be considered unresponsive and may not be considered for further review.

34.5.2 Further, in multi-stage procurements, some vendors may be eliminated from further consideration. In these cases, users may uncheck the ‘Consider’ box for certain vendor quotes from the ‘Quotes Tab’. When this action is taken, those quotes will not be shown on the side-by-side pricing comparison on the ‘Items Tab’ and will not be available for award designation.

Step	Select Quotes to Consider Process Steps
1	Click the ‘Quotes Tab’.
2	Uncheck the quote under the ‘Consider’ column.
3	Click ‘Save & Continue’.

34.6 REVIEW ITEMS TAB

34.6.1 The purpose of the ‘Items Tab’ is to display pricing by item for all considered quotes.

34.6.2 If users do not disable pricing on the quote, *NevadaEPro* will identify the lowest quote with two asterisks (**).

34.6.3 Users may award items individually or all items to one (1) single vendor.

34.7 SORTING TABULATION

34.7.1 The purpose of sorting is to enable users to view the submitted Quotes in a particular order.

34.7.2 Users can change the number of Quotes per page and can sort the Quotes in multiple ways.

Step	Sorting Tabulation Process Steps
1	Select option from ‘# of Quotes Per Page’ dropdown list.

Step	Sorting Tabulation Process Steps
2	Select option from 'Sort' by dropdown list (refer to ***Section 34.7.3, Sort by Dropdown List***) for sorting options.
3	Click 'Go'.

34.7.3 Sort by Dropdown List

SORTING OPTIONS ON DROPDOWN LIST	
Sorting Option	**Functionality – Ascending or Descending**
Quotes by Tab Sequence	Quotes are sorted numerically
Vendor Name	Quotes are sorted alphabetically by Vendor Name
Quote Total	Quotes are sorted by Total Dollar Value

34.8 ROUTING TAB

Refer to ***Section 18, Routing Tab – Common Tabs***.

34.9 ATTACHMENTS TAB

The purpose of the 'Attachments Tab' is to capture any supporting documentation regarding the 'Bid Tab' that may be helpful to other users, such as the approvers, auditors, or vendors who have access to the document.

34.9.1 Files

Files are documents that are completed outside of *NevadaEPro*, saved, and uploaded to the document. Refer to ***Section 20, Attachments Tab/Vendor Subtab Common Tabs***

34.9.2 Forms

Forms are documents that are completed electronically in *NevadaEPro* by users and saved to the document. Refer to ***Section 20, Attachments Tab/Vendor Subtab Common Tabs***.

34.10 AWARD TO ONE (1) VENDOR

Step	Award to One (1) Vendor Process Steps
1	Click the 'Items Tab'.
2	Select the Vendor for Award.

Step	Award to One (1) Vendor Process Steps
3	Click 'Award All': a) A pop-up message will appear on the screen to ensure that users want to award all items to the vendor. b) Users may click 'Cancel & Exit' to return to the previous screen.
4	Click 'Save & Continue'.

34.11 AWARD TO MULTIPLE VENDORS

Users have the ability to award one (1) line item to one (1) single vendor or the option to award one (1) line item to multiple vendors.

Step	Award to Multiple Vendors Process Steps
1	Click the 'Items Tab'.
2	Select the Vendor(s) – refer to ***Section 34.11.1, Options for Awarding Vendors.***
3	Click 'Save & Continue' – Users will be able to see the 'Total Awardable Quote Count' and 'Total Item Count' after saving the awarded vendors.

34.11.1 Options for Awarding Vendors

OPTIONS FOR AWARDING VENDORS	
Awarding Option	**Functionality**
Award all items to one (1) vendor	One (1) vendor is awarded all items and only one (1) PO will be created when the bid is converted.
Award one (1) vendor per item	Only one (1) vendor is awarded each item. A PO will be created for each vendor when the bid is converted.
Award multiple vendors per item	Multiple vendors are awarded items. A PO will be created for each vendor when the bid is converted.

34.12 CANCEL ITEMS

Step	Cancel Items Process Steps
1	Select the item under 'Cancel.'
2	Click 'Save & Continue' – Users can also select the 'Cancel Item' button to cancel the selected items.

34.13 REVISIONS TAB/REVISION SUBTAB

34.13.1 The purpose of the 'Revisions Tab/Revision Subtab' is to allow the vendor to update and resubmit their quote.

34.13.2 Users may create a notification to the vendor for the revision including the due date for the revision.

34.13.3 Send Revision Request

Step	Send Revision Request Process Steps
1	Select the quotes to request the revision.
2	Select the 'Due Date' for the revision – Users must select the 'Due Date' for the revision being sent.
3	Click 'Send Notification to Selected Vendors' – Users may also create notifications for each individual vendor by clicking 'Create Notification' next to each quote submitted.
4	Create the Notification – Users must enter the 'Subject' and 'Text' for the notification and may enter additional email recipients and add attachments to the notification.
5	Click 'Send Revision Request': a) A new window will open to ensure that users want to send the revision to the selected vendor(s). b) Click 'Cancel & Exit' to exit out of the notifications screen, and the notification will not be saved.

34.13.4 Review Returned Quote Revisions

Step	Review Returned Quote Revisions Process Steps
1	Click 'Close Revision Process': a) Once all revisions from vendors have been received, users must close the 'Revision Period'. b) After users close the 'Revision Period, the submitted, revised quote may be reviewed.
2	Click 'View' under 'Quote History' – A new window will open to display the quote history.
3	Click the 'Quote #' – Revised quotes will be shown with an 'R' and the number of the revision appended to the original quote number for the vendor.
4	Click 'Close Window'.

34.13.5 Send Additional Revision Requests

34.13.5.1 Once the ‘Revision Period’ is closed, users have the option to create a new round of ‘Revisions’ and send an additional ‘Revision Request’ to vendors.

34.13.5.2 Users will follow the steps in ***Section 34.13.3, Send Revision Request*** to send an additional ‘Revision Request’ to vendors.

34.13.5.3 Users can create multiple rounds of ‘Revisions’.

Step	Send Additional Revision Requests Process Steps
1	Select the next round of ‘Revision’ from the ‘Revision’ dropdown.

34.13.6 Revisions Tab/Email Communication Subtab

The purpose of the ‘Revisions Tab/Email Communication Subtab’ is to display the history of the email communication to the vendors related to revisions. It includes the date and time of when users send the ‘Revision Request(s)’.

35. SCORE TAB/MAINTAIN SUBTAB

Functionality for scoring responses to Request for Proposals (RFPs) with evaluation criteria is currently not configured in NevadaEPro.

36. CREATING OPEN AND ROLLING ENROLLMENT BIDS

36.1 GENERAL

36.1.1 *NevadaEPro* allows DA Users, if granted access and BP Users to create a bid.

36.1.2 *NevadaEPro* has the functionality of open enrollment and rolling enrollment bids.

36.1.3 DA Users and BP Users have the ability to create a bid that allows vendors to respond to a bid even after responses have been opened and awarded.

36.1.4 Open Enrollment Bids

36.1.4.1 Users can configure different enrollment periods, each with their own unique bid available and bid open dates.

36.1.4.2 Vendors may submit a response during any enrollment period, even if previous responses have been opened and awarded for that particular bid.

36.1.5 Rolling Enrollment Bids

36.1.5.1 Users may open the bid to view and award submitted responses at any time.

36.1.5.2 Vendors are able to submit quotes for these bids at any time up to the bid opening date, even if the bid has been opened and other awards have been made.

36.1.6 The purpose of a creating open and rolling enrollments bids is to allow users to designate periods of quote submission and award over the course of a much longer time frame.

36.1.7 The bid can be used over many periods to award as opposed to a standard formal bid solicitation that is closed once the award(s) are made to vendors.

Step	Creating Open and Rolling Enrollment Bids Process Steps
1	Click the ‘Plus (+) Icon’.
2	Click ‘Bid Solicitation’ in the dropdown.
3	Select ‘Create a Bid’ from scratch – Users can choose to clone a bid from another document.
4	Click ‘Continue’ – Select ‘Cancel & Exit’ out of the page and return to the ‘Homepage’.

36.2 GENERAL TAB – CREATING OPEN AND ROLLING ENROLLMENT BIDS

36.2.1 The purpose of the 'General Tab' is to capture header level data for the specific document.

36.2.2 Each document template is blank when created from scratch.

36.2.3 Users complete the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

Step	Required Fields – Open and Rolling Enrollment Bids Process Steps
1	Users must complete all required fields marked with an asterisk (*) before saving the new document. Refer to ***Section 36.2.4, Required Field Descriptions – Open and Rolling Enrollment Bids – General Tab***.
2	Select Enable Rolling Enrollment/Open Enrollment: a) Users select either 'Rolling Enrollment' or 'Open Enrollment' depending on the function and purpose of the bid. b) If users wish to change from one type to the other, users must uncheck the selection and then select the correct type.
3	Click the 'Date Icons' to select the 'Start Date' and 'End Date' for enrollment period of open enrollment bids. a) If the bid is an 'Open Enrollment Bid', users select the 'Enrollment Periods'. b) Click 'Add Enrollment Period' to add additional 'Enrollment Periods'. c) The option to enter 'Enrollment Periods' does not display if users select 'Enable Rolling Enrollment'. ***Note: The 'Bid Opening Date' and the 'Bid Available Date' fields at the top of the 'General Tab' serve as the first 'Enrollment Start and End Dates'.***
4	Click 'Save & Continue' – Once users save the document, protected fields are auto-filled, and the document is now searchable in *NevadaEPro*, including from the user's 'Homepage'. Refer to ***Section 36.2.5, Protected Field Descriptions – Open and Rolling Enrollment Bids – General Tab.***
5	Complete Optional Fields as preferred – refer to ***Section 36.2.6, Optional Field Descriptions – Open and Rolling Enrollment Bids – General Tab.***
6	Click 'Save & Continue'.

36.2.4 Required Field Descriptions - Open and Rolling Enrollment Bids – General Tab

REQUIRED FIELD DESCRIPTIONS – OPEN AND ROLLING ENROLLMENT BIDS – GENERAL TAB	
Field Name	**Functionality**
Description	Description of the goods or services to be procured. Searchable in internal and external searches.
Purchaser	Dropdown of BP Users in organizations of the document. Allows users to assign a purchaser to the bid or assign a new purchaser if the original BP User cannot complete the bid.
Department	Originating department of the document. Ship-To and Bill-To addresses are made available based on the department selected. Configured to trigger approval paths.
Location	Originating location of the document. Searchable in internal searches. Configured to trigger approval paths.
Bid Opening Date	Date and time when bid will be opened, if users select the bid as open enrollment. Date and time after which vendors can no longer submit quotes. For open enrollment bids, the opening date will signal the close of the first enrollment.
Available Date	Date and time when bid will be available for vendor response, if users select the bid as open enrollment. bid available date serves as the first enrollment start date. Date and time vendors can submit quotes.
Purchase Method	Dropdown - Open Market or Blanket. Blanket allows users to enter blank begin and end dates on the bid. For indefinite quantity over multiple years, Master Blanket is typically selected.
Print Format	Populated with default print form. Bid print includes internal information (e.g., accounting information). Vendor print is for external use. Determine which version of the print form is generated when user clicks print. It is recommended to not print bids.

36.2.5 Protected Field Descriptions - Open and Rolling Enrollment Bids – General Tab

PROTECTED FIELD DESCRIPTIONS – OPEN AND ROLLING ENROLLMENT BIDS – GENERAL TAB	
Field Name	**Functionality**
Bid Number	Automatically generated upon the first save. Searchable in internal and external searches. Configured to reflect the originating organization or department, fiscal year and sequential number.
Status	Initial status is set to ‘In Progress’ and will update as the bid is processed and if the document is editable.
Fiscal Year	Fiscal year in which the document was created.

PROTECTED FIELD DESCRIPTIONS – OPEN AND ROLLING ENROLLMENT BIDS – GENERAL TAB	
Field Name	**Functionality**
Organization	Originating organization of the document. Status may not be visible in certain other organizations. May be used to trigger approval paths.
Date Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.
Solicitation Enabled	Indicates that the bid is the result of a solicitation enabled release. The resulting spend from the bid is tied to a MBPO. The bid is used as secondary competition off of an established master blanket.

36.2.6 Optional Field Descriptions - Open and Rolling Enrollment Bids – General Tab

OPTIONAL FIELD DESCRIPTIONS – OPEN AND ROLLING ENROLLMENT BIDS – GENERAL TAB	
Field Name	**Functionality**
How Solicited	Dropdown list to determine how vendors are notified of bid opportunities; e.g. email.
Type Code	***Note: Functionality is not configured in NevadaEPro.***
Show on Web	If checked the bid will be displayed and seen by vendors on website. Do not check if the procurement is of a sensitive nature.
Allow Electronic Response	If checked, vendors will be able to use *NevadaEPro* to respond to bids.
Required Date	Date when goods or services are needed. Used for commodity bids.
Purge Date	***Note: Documents will not be purged from NevadaEPro in order to retain an audit trail of all transactions.***
Bid Type	Dropdown option of open or closed. Defaults to open bid. Open bids are available for quotes by vendors. Closed bids are bids only available for quotes by vendors listed on the 'Bidders Tab'. Formal bids are open to ensure open and fair competition. Informal bids may be closed.
Informal Bid	Checkmark to select bid to be informal bid. If user selects rolling enrollment, bid will be marked as an informal bid. If informal bid, users can view quotes as they are submitted. Frequently used for bids that fall below the formal bid threshold.
Control Code	***Note: Functionality is not configured in NevadaEPro.***
Estimated Cost	Editable field to enter estimated total cost of bid. Defaults to calculated amount once items and pricing are entered. Configured to trigger approval paths.
Print Dest. Detail	Dropdown list of print destination.

OPTIONAL FIELD DESCRIPTIONS – OPEN AND ROLLING ENROLLMENT BIDS – GENERAL TAB	
Field Name	**Functionality**
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***
Item Single Award Only	Checkmark to select if items must be awarded to one (1) single vendor. BP Users will not be able to award line items to multiple vendors.
Allow Vendors to submit multiple/alternate quotes	Checkmark to allow vendors to submit multiple quotes before bid opening date.
Pre-Bid Conference	Comment field to include pre-bid conference information if applicable. Visible to public and vendors.
Bulletin Desc	Comment field to add additional text to vendor notification email.
Quote Notification	Checkmark to select if user wishes to receive an email when each vendor submits a quote.
Enable Rolling Enrollment	Checkmark to select if users wish to allow vendors to respond to bid after responses have been opened and awarded. Users will be able to open, view and award bid at any time to different vendors.
Enable Open Enrollment	Checkmark to select if users wish to use the same bid with different enrollment periods and allow vendors to respond after responses have been opened and awarded. Users will set enrollment periods and the start and end dates.

36.3 OPEN AND ROLLING ENROLLMENT BIDS ADDITIONAL TABS TO COMPLETE

Open and Rolling Enrollment Bids – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/General Subtab	***Section 10, Items Tab/General Subtab – Common Tabs***
Items Tab/Address Subtab	***Section 12, Items Tab/Address Subtab – Common Tabs***
Items Tab/Accounting Subtab	***Section 13, Items Tab/Accounting Subtab – Common Tabs***
Items Tab/Attachments Subtab	***Section 14, Items Tab/Attachments Subtab – Common Tabs***
Items Tab/Notes Subtab	***Section 15, Items Tab/Notes Subtab – Common Tabs.***
Note: Refer to Section 36.5 for additional tabs to complete.	

36.4 ITEMS TAB/QUESTIONS SUBTAB

36.4.1 The purpose of the ‘Items Tab/Questions Subtab’ is to ask the vendor questions that will be part of the vendor's electronic response regarding the item.

36.4.2 This functionality is typically used when a BP User needs to collect compliance and/or product level information on a particular item (e.g., Does your product comply with the State's green initiative?).

36.4.3 Users can choose to require the vendor to answer the question or make the question optional.

36.4.4 If a question applies to all Items on the document, it should be created on the ‘Questions Tab’.

36.4.5 Users can add questions to an individual item by following the steps below:

<table>
<tr><th>Step</th><th colspan="2">Add Questions to an Individual Item Process Steps</th></tr>
<tr><td>1</td><td colspan="2">Click the ‘Item #’.</td></tr>
<tr><td>2</td><td colspan="2">Enter question information in the box – Users have a 255 character limit for each question.</td></tr>
<tr><td rowspan="10">3</td><td colspan="2">Select a ‘Response Type’ from the dropdown – based on the response types noted below:</td></tr>
<tr><td>Response Type Name</td><td>Responses Available to Vendor</td></tr>
<tr><td>Availability Response</td><td>Fully Provided; or
Not Provided; or
Custom Development Required; or
Provided with Modifications; or
Provided with Reporting/Development Tool.</td></tr>
<tr><td>Average Rating – Poor to Excellent</td><td>Poor; or
Below Average; or
Average; or
Above Average; or
Excellent.</td></tr>
<tr><td>Comment Response – extended text</td><td>Open text box – 4,000 characters</td></tr>
<tr><td>Rating Scale from 1 to 10</td><td>Can enter any number from 1 to 10</td></tr>
<tr><td>Rating Scale from 1 to 5</td><td>Can enter any number from 1 to 5</td></tr>
<tr><td>Basic Text Response</td><td>Open text box – 4,000 characters</td></tr>
<tr><td>True or False Response</td><td>Can enter either true or false</td></tr>
<tr><td>Yes or No Response</td><td>Can enter either yes or no</td></tr>
</table>

Step	Add Questions to an Individual Item Process Steps
4	Complete Optional Fields, as preferred: c) If users select the 'Required' checkbox, then vendors must answer the question before submitting their quote. d) The 'Print Sequence' allows users to reorder the questions.
5	Click 'Save & Exit'. d) Click 'Reset' to erase all information entered in the 'Question' field box prior to clicking 'Save & Continue'. e) A plus sign (+) displays next to the 'Item #' indicating a question exists for that item. f) Any question may be deleted after being saved.
6	Click the plus sign (+) next to the Item # - This will allow users to view the question(s) for an individual item.
7	Review the question(s) for an item – Users can delete questions for specific items from here by clicking 'Select Question' and then 'Delete Selected Questions'. To edit the item, click the 'Item #'.

36.5 ADDITIONAL TABS TO COMPLETE FOR OPEN AND ROLLING ENROLLMENT BIDS

Additional Tabs to Complete for Open and Rolling Enrollment Bids	
Tab Description	**Reference**
Address Tab	***Section 16, Address Tab – Common Tabs***
Accounting Tab	***Section 17, Accounting Tab – Common Tabs***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***
Bidders Tab/General Subtab	***Section 31.7, Bidders Tab/General Subtab***
Bidders Tab/Subcontractors Subtab	***Section 31.9, Bidders Tab/Subcontractors Subtab***
Bidders Tab/Quote Activity Subtab	***Section 31.10, Bidders Tab/Quote Activity Subtab***
Bidders Tab/BidSync Vendors Subtab	***Section 31.11, Bidders Tab/BidSync Vendors Subtab***

Additional Tabs to Complete for Open and Rolling Enrollment Bids	
Tab Description	**Reference**
Questions Tab	***Section 31.12, Questions Tab***
Amendments Tab	Amendments Tab will only become available to users after the bid is approved and sent (refer ***to Section 32, Creating a Bid Amendment***).
Q&A Tab	***Section 31.12, Questions Tab***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs***
Note: Refer to Section 36.11 for additional tabs to complete.	

36.6 SENDING THE BID

36.6.1 Once the bid is approved, it must be 'sent' by users in order for it to post and be available for vendor response.

36.6.2 When all approvals have been completed, a 'Send Bid' button will appear at the bottom of the 'Summary Tab' of the bid.

Step	Sending the Bid – Open and Rolling Enrollments Process Steps
1	Click the 'Summary Tab'.
2	Click the 'Send Bid Action' Option – Users have the option to change the status to 'Sent' and notify the vendors or to only change the status to 'Sent'.

36.7 CREATING A BID AMENDMENT

36.7.1 The purpose of the amendment is to modify the bid after the bid is sent to vendors.

36.7.2 Common reasons to create a bid amendment are to:

36.7.2.1 Change the available date; or
36.7.2.2 Bid opening date; or
36.7.2.3 Modify the items on the bid.

36.7.3 For both open and rolling enrollments bids, users may create a bid amendment even after the bid is in 'Opened' status.

36.7.4 Refer to ***Section 32, Creating a Bid Amendment***, however, ***Section 36.8, General Tab – Bid Amendment*** is specific to open enrollment bids regarding the bid amendment.

36.8 GENERAL TAB – BID AMENDMENT

The ‘General Tab’ can be updated using the amendment; however, the only fields on the ‘General Tab’ that can be modified are identified below:

36.8.1 Purchaser
36.8.2 Show on Web
36.8.3 Allow Electronic Response
36.8.4 Bid Opening Date
36.8.5 Available Date
36.8.6 Estimated Cost
36.8.7 Allow Vendors to Submit Multiple/Alternate Quotes
36.8.8 Enrollment Periods
36.8.9 Info Contact
36.8.10 Pre-Bid Conference

Step	Open and Rolling Enrollment Bid Amendment Process Steps
1	Update fields as preferred – Users can remove or add ‘Enrollment Periods’ for the Open Enrollment Bid’.
2	Click ‘Save & Continue’.
3	Click the ‘Attachments Tab’. a) Users can add additional files or update or delete existing files. b) Forms are documents that are completed electronically in *NevadaEPro* by users and saved to the document.
4	Click the ‘Summary Tab’ – refer to ***Section 32, Creating a Bid Amendment’***.

36.9 WORKFLOW DIAGRAM

Refer to ***Section 44.10, Open and Rolling Enrollment Bid Workflow Diagram.***

36.9.1 BP Users can begin to view quotes as they come in before the ‘Bid Opening Date’.

36.9.2 Once the bid reaches its ‘Bid Opening Date’, vendors are no longer able to submit quotes, and BP Users can begin the ‘Evaluation for Bid Award’.

36.9.3 Once BP Users send the bid, the bid will be visible to the public and the vendors on the ‘Available Date’ or future ‘Enrollment Start Dates’.

36.9.4 Once the bid reaches the ‘Bid Opening Date’ or future ‘Enrollment End Dates’, BP Users can begin the ‘Evaluation for Bid Award’.

36.9.5 The bid is available for quote submission for 'Open Enrollment Bids' when the bid reaches its 'Enrollment Start Date'.

36.10 OPENING AND EVALUATING THE BID RESPONSES

36.10.1 After the 'Bid Opening Date/Time; has passed, users can open the bid and access the 'Bid Tabulation'.

36.10.2 The 'Bid Tabulation' is a feature in *NevadaEPro* that allows users to view vendor quotes and provides a number of features to evaluate and award the bid, including scoring and online quote revisions.

36.10.3 For 'Rolling Enrollment Bids', however, users can review submitted quotes from vendors and award items once the bid has been sent before its 'Bid Opening Date and Time'. Vendors can submit quotes for 'Rolling Enrollment Bids' up until the 'Bid Opening Date/Time'.

Step	Opening and Evaluating the Bid Responses Process Steps
1	Click the 'Bid Solicitation(s) Ready to Open' actionable status box.
2	Click the 'Bid Solicitation #' - Click the arrows to view more pages of 'Bids in Ready to Open' status.
3	Click 'Open Bid' – the 'Open Bid' button is located at the bottom of the 'Summary Tab'.
4	Click the 'Bid Tab' button – the 'Bid Tab' button is located at the bottom of the 'Summary Tab'.

36.11 ADDITIONAL TABS TO COMPLETE FOR OPEN AND ROLLING ENROLLMENT BIDS

Additional Tabs to Complete for Open and Rolling Enrollment Bids	
Tab Description	**Reference**
Quotes Tab	***Section 33.3, Quotes Tab***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Award to One (1) Vendor	***Section 34.10, Award to One (1) Vendor***
Award to Multiple Vendors	***Section 34.11, Award to Multiple Vendors***
Revisions Tb/Revision Subtab	***Section 34.13, Revisions Tab/Revision Subtab***
Score Tab/Maintain Subtab	***Note: Functionality is currently not configured in NevadaEPro***
Score Tab/Score Entry Subtab	***Note: Functionality is currently not configured in NevadaEPro***

36.12 SUMMARY TAB

36.12.1 The ‘Summary Tab’ provides an overview of information provided to users on the previous tabs for review prior to submitting the document for approval.

36.12.2 Once the document is submitted, users cannot edit the document.

36.13 RE-OPENING THE BID TAB – OPEN AND ROLLING ENROLLMENT BIDS

36.13.1 After the bid award is approved and users have created a PO, users can re-open the ‘Bid Tab’ in order for vendors to submit quotes for rolling enrollment bids and during new enrollment periods for open enrollment bids.

36.13.2 When the bid is re-opened, BP Users can evaluate the new quotes from vendors.

36.13.3 Note: For Open Enrollment Bids, users must award all the items on the bid to re-open the ‘Bid Tab’.

Step	Re-Open Bid Tab – Open and Rolling Enrollment Process Steps
1	Go to ‘Summary Tab’ of the ‘Bid Tab’.
2	Click ‘Re-Open Bid Tab’: a) Once users click ‘Re-Open Bid Tab’, the bid status will change to ‘Opened’. b) Vendors will be able to submit new quotes once the bid reaches its ‘Enrollment Start Date for Open Bids’. c) When users re-open the bid, the bid begins a new cycle of quote submission and evaluation of quotes.

37. CREATING A REVERSE AUCTION BID

37.1 GENERAL

37.1.1 *NevadaEPro* allows DA Users, if granted access, and BP Users to create reverse auction bid solicitations.

37.1.2 The purpose of a reverse auction bid is to establish a procurement event for vendors to competitively bid on goods or services in an auction format.

37.1.3 The auction event works in reverse such that vendors are placing bids with increasingly lower pricing for the goods or services until the auction concludes.

37.1.4 Users may create a reverse auction bid using one (1) of three (3) methods:

37.1.4.1 Create from scratch; or
37.1.4.2 Convert from an approved requisition; or
37.1.4.3 Clone from an existing bid.

Step	Reverse Auction Bid Creation from Scratch Process Steps
1	Click the ‘Plus (+) Icon’.
2	Click ‘Bid Solicitation’ in the dropdown to create a bid from scratch.
3	Select ‘Create a Bid from Scratch’ – Users can choose to clone a bid from another document.
4	Click ‘Continue’ – Users can select ‘Cancel & Exit’ to exit out of the page and return to the Homepage.

37.2 REVERSE AUCTION BID GENERAL TAB

37.2.1 The purpose of the ‘General Tab’ is to capture header level data for the specific document.

37.2.2 Each document template is blank when created from scratch.

37.2.3 Users complete the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

Step	Reverse Auction Bid General Tab Process Steps
1	Select ‘Reverse Auction’ from the ‘Type Code’ dropdown list – the ‘Reverse Auction Type Code’ will alter a number of fields on the page that are unique to the ‘Reverse Auction Bid’ document.
2	Complete the ‘Required Fields’ – Users must complete all required fields, marked with an asterisk (*), before saving the new document. Refer to ***Section 37.2.4, Required Field Descriptions for Reverse Auction Bid – General Tab.***

Step	Reverse Auction Bid General Tab Process Steps
3	Click 'Save & Continue': a) Once users save the document, protected fields are auto-filled. b) The document will now be searchable in *NevadaEPro* by an authorized user, including from the user's Homepage. c) Refer to ***Section 37.2.5, Protected Field Descriptions for Reverse Auction Bid – General Tab***.
4	Complete Optional Fields, as preferred (refer to ***Section 37.2.6, Optional Field Descriptions for Reverse Auction Bid – General Tab***).
5	Click 'Save & Continue'.
6	Click 'Items Tab'.

37.2.4 Required Field Descriptions for Reverse Auction Bid - General Tab

REQUIRED FIELD DESCRIPTIONS FOR REVERSE AUCTION BID - GENERAL TAB	
Field Name	**Functionality**
Description	Description of the goods or services to be procured. Searchable in internal and external searches.
Purchaser	Dropdown of BP Users in organization. Allows users to assign a new purchaser if the original BP user cannot complete the bid.
Department	Originating department of the document. Ship-To and Bill-To addresses are made available based on the department selected. Configured to trigger approval paths.
Location	Originating location of the document. Searchable in internal searches. Configured to trigger approval paths.
View Auction Date	Date and time when external users will be able to view the bid.
Bid Opening Date	Date and time when bid will be opened, and vendors can no longer submit quotes.
Auction Start Date	Date and time when vendors are able to start bidding.
Available Date	Date and time vendors can submit quotes.
Purchase Method	Dropdown: Open Market or Blanket. Blanket allows users to enter begin and end dates on the bid. For indefinite quantity over multiple years, Master Blanket is typically selected.
Print Format	Populated with default print form. Bid print includes internal information (e.g., accounting information). Vendor print is for external use. Determine which version of the print form is generated when user clicks print. Recommended not to print bids.

37.2.5 Protected Field Descriptions for Reverse Auction Bid – General Tab

PROTECTED FIELD DESCRIPTIONS FOR REVERSE AUCTION BID – GENERAL TAB	
Field Name	**Functionality**
Bid Number	Automatically generated upon the first save. Searchable in internal and external searches. Configured to reflect the originating organization or department, document fiscal year and sequential number.
Status	Initial status is set to 'In Progress' and will update as the bid is processed and if the document is editable.
Fiscal Year	Identify the accounting fiscal year of the document.
Organization	Originating organization of the document. May be used for approval paths. Certain status of the document may not be visible by other organizations.
Date Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.
Solicitation Enabled	Indicates that the bid is the result of a solicitation enabled release. The resulting spend from this bid is tied to an MBPO. The bid is used as secondary competition off of an established MBPO.

37.2.6 Optional Field Descriptions for Reverse Auction Bid – General Tab

On the 'Reverse Auction' document, certain optional fields may generate new required fields, when used. For example, using the 'soft close enabled' feature will require users to input the duration of the soft close quiet period and the soft close order date.

OPTIONAL FIELD DESCRIPTIONS FOR REVERSE AUCTION BID – GENERAL TAB	
Field Name	**Functionality**
How Solicitated	Dropdown list of how vendors will be notified of bid opportunities
Type Code	***Note: Functionality is not configured in NevadaEPro.***
Show on Web	Visible to public if checked. Show on website, unless procurement is of a sensitive nature
Allow Electronic Response	Checkmark to allow vendors to submit electronic quotes through *NevadaEPro.*

OPTIONAL FIELD DESCRIPTIONS FOR REVERSE AUCTION BID – GENERAL TAB	
Field Name	**Functionality**
Required Date	Date when goods or services are needed. Often used for commodity bids.
Purge Date	***Note: Documents will not be purged from NevadaEPro in order to retain an audit trail of all transactions.***
Auction Type	Dropdown option of open or closed - Defaults to open bid. Open bids are available for quotes by all vendors. Closed bids are only available for quotes by vendors listed on 'Bidders Tab'. Formal bids are open to ensure open and fair competition. Informal bids may be closed.
Bid Increment	Dollar amount for competing bid increments.
Soft Close Enabled	Soft close feature. If selected, users must select 'Soft Close Order Date' and Quiet Period'.
Soft Close Order Date	Time for the soft close feature to begin monitoring activity when soft close is enabled. Required if users enable soft close feature.
Soft Close Quiet Period	Length of quiet time (in minutes) that users will check for activity. Required if users enable soft close feature
Control Code	***Note: Functionality is not configured in NevadaEPro.***
Estimated Cost	Editable field to enter estimated total cost of bid. Defaults to calculated amount once items and pricing are entered. Configured to trigger approval paths.
Print Dest. Detail	Dropdown list of print destinations.
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***
Item Single Award Only	Checkmark to select if items must be awarded to one (1) single vendor. BP User will not be able to award line items to multiple vendors.
Allow Vendors to Submit Multiple/Alternate Quotes	Checkmark to allow vendors to submit multiple quotes. Vendors can submit multiple quotes before bid opening date.
Pre-Bid Conference	Comment field to include pre-bid conference information, if applicable. Visible to vendors and public.
Bulletin Desc	Comment field to add additional text to vendor notification email. Visible to vendors notified of bid by email.
Quote Notification	If checked user will receive an email when each vendor submits a quote.

37.3 REVERSE AUCTION ITEMS TAB/GENERAL SUBTAB

37.3.1 The purpose of the 'Items Tab/General Subtab' is to capture what goods or services users are procuring.

37.3.2 Users may add items using one (1) of three (3) methods:

37.3.2.1 Search and add existing items; or
37.3.2.2 Add new items from scratch; or
37.3.2.3 Upload/import items from a spreadsheet.

37.3.3 Refer to ***Section 10, Items Tab/General Subtab – Common Tabs***.

37.3.4 The use of three (3) item fields (when they appear on bids) is unique to this document type and are identified in the table below.

REVERSE AUCTION ITEMS TAB/GENERAL SUBTAB – UNIQUE FIELDS	
Field Name	**Functionality**
Disable Pricing on Quote	If checked, vendors will not be able to enter pricing on their quote and should attach pricing.
UOM	Unit of Measure for item. Visible externally and to vendors. Cannot be updated by Vendor. However, it will allow vendors to provide alternate UOM in alternate description of quote, if applicable.
Discount %	Discount % for Items. Discount % will change the total cost of item. Typically not entered by BP User to estimate cost, however, may be used by vendor on bid

37.4 REVERSE AUCTION BID - ADDITIONAL TABS TO COMPLETE

Reverse Auction Bid – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/Address Subtab	***Section 12, Items Tab/Address Subtab – Common Tabs***
Items Tab/Accounting Subtab	***Section 13, Items Tab/Accounting Subtab – Common Tabs***
Items Tab/Attachments Subtab	***Section 14, Items Tab/Attachments Subtab – Common Tabs***
Items Tab/Notes Subtab	***Section 15, Items Tab/Notes Subtab – Common Tabs***
Address Tab	***Section 16, Address Tab – Common Tabs***
Accounting Tab	***Section 17, Accounting Tab – Common Tabs***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***

Reverse Auction Bid – Additional Tabs to Complete	
Tab Description	**Reference**
Note: Refer to Section 37.16 for additional tabs to complete.	

37.5 BIDDERS TAB/GENERAL SUBTAB

The purpose of the 'Bidders Tab' is to select vendors that will be notified of and be allowed to participate in the 'Reverse Auction Bid'.

Step	Add Vendors Process Steps
1	Click 'Lookup & Add Vendors' – A new window will open.
2	Enter data into search fields and click 'Find It' – Users can also click 'Find Vendors for All Commodity Codes' on the bid (without entering any search criteria) to add vendors who registered with NIGP Code(s) that match the NIGP Code(s) listed on the bid items.
3	Select the Vendor(s)
4	Click 'Save & Exit' at the bottom of the screen – Users can click 'Save & Continue' to continue searching for and adding vendors.
5	Complete Optional Fields as preferred per ***Section 37.5.1, Optional Field Descriptions for Adding Vendors – General Tab***.
6	Click 'Save & Continue'.

37.5.1 Optional Field Descriptions for Adding Vendors – General Tab

OPTIONAL FIELD DESCRIPTIONS FOR ADDING VENDORS – GENERAL TAB	
Field Name	**Functionality**
Unrestricted Bid	Bid will show in open bids section on login page and all registered vendors can view and respond.
Restricted Bid	Bid will only show in open bids section for vendors selected on 'Bidders Tab'. Used when procuring goods/services is sensitive or when the Vendor pool is limited
Show Unit Prices to Vendors	If checked, vendors will see unit prices on bid. Rarely used for formal solicitations.
Hide Bid Holder List	If checked, 'Bidders Tab' is not visible externally or to vendors.

37.6 DELETE VENDORS

Users can delete selected Vendors or all Vendors on the 'Bidders Tab'.

Step	Delete Vendors Process Steps
1	Select the checkbox in the 'Delete' column associated with the vendor(s) to delete – Users can select 'Delete All' to select all vendors on 'Bidders Tab'.
2	Click 'Save & Continue'.
3	Click 'Bidders Tab/Subcontractors Tab'.

37.7 BIDDERS TAB/SUBCONTRACTORS SUBTAB

The purpose of the 'Bidders Tab/Subcontractors Subtab' is to identify any subcontractor participation requirement and related participation data for the bid.

37.7.1 Add a Subcontractor Goal

Step	Add a Subcontractor Goal Process Steps
1	Select category from 'Vendor Category' dropdown – Vendor categories are unique and are used to capture information about each vendor.
2	Enter the 'Target Percent'.
3	Complete Optional Fields as preferred. Refer to ***Section 37.7.2, Optional Field Descriptions for Adding Subcontractor Goal.***
4	Click 'Save & Continue': d) Click 'Save & Exit' to save the changes and return to the 'Summary Tab'; or e) 'Cancel & Exit' to not save the changes and return to the 'Summary Tab'. f) Select 'Reset' to erase all entered information.

37.7.2 Optional Field Descriptions for Adding Subcontractor Goal

OPTIONAL FIELD DESCRIPTIONS FOR ADDING SUBCONTRACTOR GOAL	
Field Name	**Functionality**
Text box to designate the need for subcontractors	Free form field to describe subcontractor requirements. Visible to vendors. Allows purchaser to provide instructions to vendors to complete the subcontractor requirements.

OPTIONAL FIELD DESCRIPTIONS FOR ADDING SUBCONTRACTOR GOAL	
Field Name	**Functionality**
Subcontractors must be certified in at least one (1) bid item NIGP Code	Check to require subcontractors to be registered with one (1) NIGP Code on the bid items. Subcontractors will need to be registered within *NevadaEPro* to be certified in NIGP Code(s) on the bid. Allows restrictions of which subcontractors that may be added by vendor to quote.
Subcontractors must acknowledge inclusion	Check to require subcontractors to contact agency in the event of inclusion. Subcontractors will need to be registered within *NevadaEPro* to acknowledge inclusion. Ensures that subcontractors know of an agreement to participate in prime vendor's quote.
Hours from Bid closing for subcontractors to acknowledge inclusion	Hours before bid closing that subcontractors have to contact the agency of inclusion. Visible to vendors.
Mandatory	Vendors are required to list a subcontractor on the quote. Subcontractors must be registered in *NevadaEPro* to be added to a quote.
Category Certified Vendors only	Check to make subcontractors certify they meet category requirements. Subcontractors will need to be registered within *NevadaEPro* to acknowledge inclusion.

37.7.3 Delete a Subcontractor Goal

Step	Delete a Subcontractor Goal Process Steps
1	Select the 'Delete' checkbox associated with the vendor category to delete – To remove all subcontractor goals, click 'Delete All'.
2	Click 'Save & Continue'.
3	Click 'Bidders Tab/Quote Activity'.

37.8 BIDDERS TAB/QUOTE ACTIVITY SUBTAB

37.8.1 The purpose of the 'Bidders Tab/Quote Activity Subtab' is to show users when vendors have submitted quotes.

37.8.2 The 'Bidders Tab/Quote Activity Subtab' will show the date and time when a vendor submits an electronic quote.

37.8.3 It will also show users when a quote has been withdrawn or withdrawn and resubmitted.

37.9 BIDDERS TAB/BIDSYNC VENDORS SUBTAB

37.9.1 The 'Bidders Tab/BidSync Vendors Subtab' is available to users when the integration to BidSync is enabled.

37.9.2 The purpose of the 'Bidders Tab/BidSync Vendors Subtab' is to increase the bidder pool for the bid through the BidSync supplier network, which increases competition.

37.9.3 Vendors that are added to the bid will receive a notification when the bid is sent; however, they must register in *NevadaEPro* in order to submit a quote.

37.9.3.1 Add BidSync Vendors

Step	Add BidSync Vendors Process Steps
1	Click 'Bidders Tab/BidSync Vendors'.
2	Click Lookup BidSync vendors – A new window will open.
3	Enter data into search fields – Users can select that the vendor name and contact to be an exact match.
4	Click 'Search': a) Users can select 'Clear' to clear the entered information. b) Typically, users enter criteria such as classification codes (e.g., NIGP codes), city names, or zip codes to locate vendors in their area that provide the goods or services associated with the bid.
5	Click 'Add and Close' – Users can select 'Add and Continue' to add additional vendors.
6	Click 'Save & Continue'.

37.9.4 Delete BidSync Vendors

Step	Delete BidSync Vendors Process Steps
1	Select the 'Delete' checkbox associated with the vendor(s) to delete – Users can select 'Delete All' to delete all the BidSync vendors.
2	Click 'Save and Continue'.

37.10 AMENDMENTS TAB

37.10.1 The purpose of the 'Amendments Tab' is to capture any changes to the bid after it has been sent and before the 'Bid Opening Date'.

37.10.2 The ‘Amendments Tab’ will only become available to users after the bid is approved and sent (refer to ***Section 32, Creating a Bid Amendment).***

Step	Amendments Tab Process Steps
1	Click ‘Q&A Tab’: a) The ‘Q&A Tab’ allows for dialogue between the vendor community and users. b) Users can allow the vendor to submit questions about the bid once the bid is sent and posted online.

37.10.3 Turn on Q&A

Step	Q&A Process Steps
1	Select ‘Allow Vendor to Submit Questions’: a) Users can select to receive notification when vendors submit questions. b) Users can return to the ‘Q&A Tab’ at any time to turn off the Q&A. c) Users do not need to create a bid amendment to turn off Q&A; however, turning off Q&A cannot be scheduled automatically within *NevadaEPro*. As such, setting up a reminder to turn off Q&A is recommended.
2	Complete Optional Fields, as preferred (refer to ***Section 37.10.4, Optional Field Descriptions for Q&A Process***).
3	Click ‘Save & Continue’ – Users can click ‘Reset’ to undo the action.

37.10.4 Optional Field Descriptions for Q&A Process

OPTIONAL FIELDS DESCRIPTIONS FOR Q&A PROCESS	
Field Name	**Functionality**
Question Support	Free field text for subject of question. Viewable externally and to vendors.
Question	Free field text for question. Viewable externally and to vendors.
Answer	Free field text for answer. Viewable externally and to vendors.
Show All on Web	Check to make viewable to all vendors.
Show Original Vendor Only	Check to only make the question or answer viewable to the individual vendor that asked the question.

OPTIONAL FIELDS DESCRIPTIONS FOR Q&A PROCESS	
Field Name	**Functionality**
Send notification when Vendor submitting question	If checked, *NevadaEPro* will send email to user.

37.10.5 Protected Field Descriptions for Q&A Process

The following fields are protected fields that the user cannot update:

PROTECTED FIELD DESCRIPTIONS FOR Q&A PROCESS – THAT CANNOT BE UPDATED	
Field Name	**Functionality**
Question #	Sequential question number as it is assigned.
Created Date	Date user created question(s). Used as an audit trail.
User Created	User who create question(s). Used as an audit trail.

37.10.6 Delete Q&A

Step	Delete Q&A Process Steps
1	Select the 'Delete' checkbox associate with the question to delete – Users can 'Delete All' to delete all Q&A.
2	Click 'Save & Continue' – Users can click 'Reset' to undo the delete action.

37.11 REMINDERS TAB

Refer to ***Section 22, Reminders Tab – Common Tabs***.

37.12 SUMMARY TAB

37.12.1 The 'Summary Tab' provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

37.12.2 Once the document is submitted, users cannot edit the document.

Step	Summary Tab Process Steps
1	Scroll to the bottom of the 'Summary Tab'.
2	Click 'Submit for Approval'.

37.13 SENDING THE BID

37.13.1 Once the bid is approved, it must be 'sent' by users in order for it to be available for the vendor response from the 'Bidders Tab'.

37.13.2 When all approvals have been completed, a new 'Send Bid' button will appear at the bottom of the 'Summary Tab' of the bid.

Step	Sending the Bid Process Steps
1	Click the 'Summary Tab'.
2	Select the 'Send Bid' action option' – Users have the option to notify the vendors or to only change the status to 'Sent'.
3	Click 'Send Bid'.
4	Click 'Ok' – If users select to notify Vendors, the email recipients display on the 'Vendor Notification Result Page'.

37.14 CREATING A BID AMENDMENT FOR A REVERSE AUCTION

37.14.1 The purpose of a bid amendment is to modify the original bid after it has been approved and posted for vendor response.

37.14.2 Common reasons to create a bid amendment include:

37.14.2.1 A change in the bid opening date; or
37.14.2.2 Modification of items on the bid.

37.14.3 Refer to ***Section 32, Creating a Bid Amendment***, however, the following is specific to reverse auction bids.

Step	Bid Amendment Specific to Reverse Auction Process Steps
1	Click 'Amendments Tab'.
2	Click 'Create Bid Amendment': a) Not all fields may be updated using a bid amendment. b) The information below shows all tabs available on the 'Reverse Auction Bid', each including what can and cannot be updated using the bid amendment.

37.15 GENERAL TAB – REVERSE AUCTION

37.15.1 The 'General Tab' can be updated using the bid amendment.

37.15.2 In addition to the protected fields outlined above, the type code, the auction type, and purchase method fields cannot be modified using the bid amendment.

37.15.3 All other fields may be updated.

Step	Reverse Auction General Tab Process Steps
1	Update fields as preferred.
2	Click 'Save & Continue'.

37.16 ADDITIONAL TABS TO COMPLETE FOR REVERSE AUCTION BIDS

Additional Tabs to Complete for Reverse Auction Bids	
Tab Description	**Reference**
Items Tab/General Subtab	***Section 31.3, Items Tab/General Subtab***
Summary Tab	***Section 31.19, Summary Tab***

37.17 WORKFLOW DIAGRAM

Refer to ***Section 44.11, Reverse Auction Bid Workflow Diagram.***

38. CREATING AN OPEN MARKET PURCHASE ORDER

38.1 GENERAL

38.1.1 BP Users can create Open Market POs.

38.1.2 The Open Market PO allows users to purchase a definite quantity of goods or services that are not on a current contract.

38.1.3 Users may create a PO using three (3) different methods:

38.1.3.1 Create from scratch; or
38.1.3.2 Convert from an existing Requisition or Bid; or
38.1.3.3 Clone from an existing PO.

Step	Create Open Market PO Process Steps
1	Click the 'Plus (+) Icon'.
2	Click 'Purchase Order' in the dropdown to create a PO from scratch.
3	Select 'Open Market' from the PO type dropdown.
4	Click 'Continue'.

38.2 GENERAL TAB – CREATING AN OPEN MARKET PO

38.2.1 The 'General Tab' captures header level data for the specific document.

38.2.2 Each document template is blank when created from scratch.

38.2.3 Users complete the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

Step	Creating an Open Market PO General Tab Process Steps
1	Complete required field as needed (refer to ***Section 38.2.4, Required Field Descriptions – Open Market PO General Tab***). The user must complete all required fields marked with an asterisk (*) before saving the new document.
2	Click Save & Continue (refer to ***Section 38.2.5, Protected Field Descriptions – Open Market PO General Tab)***. Once users save the document, protected fields are auto-filled and the document is now searchable in *NevadaEPro* by an authorized user, including from the user's homepage.
3	Complete Optional Fields as needed (refer to ***Section 38.2.6, Optional Field Descriptions – Open Market PO General Tab***).
4	Click 'Save & Continue'.
5	Click 'Items Tab'.

38.2.4 Required Field Descriptions – Open Market PO General Tab

REQUIRED FIELD DESCRIPTIONS – OPEN MARKET PO GENERAL TAB	
Field Name	**Functionality**
Short Description	Description of the goods or services to be procured – should be descriptive and unique. Searchable in internal and external searches.
Purchaser	Dropdown of BP Users in organization of the document. Allows user to assign a new purchaser if the original BP User cannot complete the PO.
Department	Originating department of the document. Ship-To and Bill-To addresses are made available based on the department selected. Configured to trigger approval paths.
Location	Originating location of the document. Searchable in internal searches. Configured to trigger approval paths.
Receipt Method	PO items are received by quantity or dollars. Determines how receiving can be completed for the PO. Generally, goods are received by quantity and services by dollars.
PO Type	Determines PO template that will be utilized. Blanket: Indefinite quantity agreement for a term. Contract: Infrequently used. G2B Blanket: Punchout. Open Market: One (1) time purchase.
Print Format	PO Print – includes internal information; e.g., accounting information. Vendor Print – for external use. It is recommended not to print Pos.

38.2.5 Protected Field Descriptions – Open Market PO General Tab

PROTECTED FIELD DESCRIPTIONS – OPEN MARKET PO GENERAL TAB	
Field Name	**Functionality**
PO Number	Automatically generated upon the first save. *NevadaEPro* is configured to reflect the originating organization or department, appropriate fiscal year, and sequential number. Searchable in internal and external searches.
Status	Initial status is set to 'In Progress' and will update as the PO is processed and if the document is editable.
Fiscal Year	Fiscal year in which the document was created. Used as indicator to the State's financial system of the fiscal year.
Organization	Originating organization of the document. Used to trigger approval paths. May be visible in a certain status by other organizations.
Entered Date	Automatically generated upon first save. Used as an audit trail and for reporting.

PROTECTED FIELD DESCRIPTIONS – OPEN MARKET PO GENERAL TAB	
Field Name	**Functionality**
Date Last Updated	Automatically generated upon first save. Used as an audit trail and for reporting.
Actual Cost	Automatically generated upon first save. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon first save. Used as an audit trail and for reporting.

38.2.6 Optional Field Descriptions – Open Market PO General Tab

OPTIONAL FIELD DESCRIPTIONS – OPEN MARKET PO GENERAL TAB	
Field Name	**Functionality**
Type code	***Note: Functionality is not configured in NevadaEPro.***
Required Date	Indicator of required delivery date of goods/services.
Control Code	***Note: Functionality is not configured in NevadaEPro.***
Retainage %	Percent of payment to be withheld pending completion of services or delivery of goods. Often used for construction contracts.
Contact Instructions	Defines contact for the PO, typically the purchaser or contract manager.
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***
Hide PO from External Users	Optional checkbox which removes the PO from public view. Low dollar of sensitive POs may be hidden, but available upon request from public.
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Promised Date	Date when goods or services will be delivered. May be used for emergency or time sensitive purchases
Days ARO	The number of days after receiving the order by which the vendor should deliver the goods.
Discount %	Percentage of discount to be applied to PO. Calculated in actual cost and used for discounted pricing

38.3 ITEMS TAB/GENERAL SUBTAB – CREATING PO FROM SCRATCH

38.3.1 The' Items Tab/General' captures what goods or services users are purchasing.

38.3.2 Users may add items using one (1) of three (3) methods:

38.3.2.1 Search for existing items; or
38.3.2.2 Add items from scratch; or
38.3.2.3 Upload/export items from a spreadsheet.

Refer to ***Section 10.3, Search Items***.

38.3.3 Add Items – Open Market PO

Refer to ***Section 10.4, Add Items***.

38.3.4 Upload/Export Items – Open Market PO

38.3.4.1 The ‘Upload/Export Items’ method is commonly used when users have a large number of items to purchase.

38.3.4.2 Users must have specific privileges to upload items on a PO.

Step	Export Items – Open Market PO Process Steps
1	Click ‘Export Items’
2	Click ‘Open’: a) The information is exported to an Excel document. b) Users may update and save the document to their desktop.

Step	Upload Items – Open Market PO Process Steps
1	Click ‘Upload Items’.
2	Click ‘Browse’.
3	Select ‘CVS File’.
4	Click ‘Save & Exit’ – Click ‘Save & Continue to continue adding items or click ‘Cancel & Exit’ to return to the last page.
5	Review and update items if applicable – Users may review all items entered and update by clicking the ‘Item #’.
6	Click ‘Items Tab/Address’.

38.3.5 Delete Items – Open Market PO

Refer to ***Section 10.5, Delete Items***.

38.4 OPEN MARKET PURCHASE ORDER - ADDITIONAL TABS TO COMPLETE

Open Market Purchase Order – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/Address Subtab	***Section 12, Items Tab/Address Subtab – Common Tabs***
Items Tab/Accounting Subtab	***Section 13, Items Tab/Accounting Subtab – Common Tabs***
Items Tab/Notes Subtab	***Section 15, Items Tab/Notes Subtab – Common Tabs***
Note: Refer to Section 38.7 for additional tabs to complete.	

38.5 VENDOR TAB/GENERAL SUBTAB – OPEN MARKET PO

The 'Vendor Tab' allows users to select the Vendor who will fulfill the PO.

38.5.1 Add Vendor

Step	Add Vendor – Open Market PO Process Steps
1	Click 'Lookup & Add Vendor' – Users may enter any of the search criteria and click 'Find It'.
2	Enter search criteria and click 'Find It' – to return all vendors, leave search criteria blank before clicking 'Find It'.
3	Select the vendor and click 'Add Vendor' – Click the arrows to view additional search results or click 'Close Window' to return to the last page without adding a vendor.
4	Click 'Save & Continue': a) Click 'Lookup & Change Vendor' once a vendor is added. b) Users may also update the PO terms to reflect the vendor's preferred terms or terms specific to the PO.

38.5.2 Select a Different Remit or PO Mailing Address

If vendors require a different 'Remit or PO Mailing Address' than what is showing as the default address, users may update the address with any other address listed on the vendor's profile.

Step	Select Different Remit or PO Mailing Address Process Steps
1	Click the 'Address' dropdown.
2	Select an address – If the address is not available, vendor must add the address to the profile before users can update the PO.
3	Click 'Vendor Tab/Subcontractors'

38.6 VENDOR TAB/SUBCONTRACTOR SUBTAB – OPEN MARKET PO

The 'Vendor Tab/Subcontractor Subtab' allows users to select the vendor who will subcontract with the primary vendor to fulfill the PO.

38.6.1 Add a Subcontractor – Open Market PO

Step	Add a Subcontractor – Open Market PO Process Steps
1	Click 'Lookup & Add Vendor Subcontractors – Users may enter any of the search criteria and click 'Find It'.
2	Enter search criteria and click 'Find It'; a) To return all vendors, leave search criteria blank before clicking 'Find It'. b) Click 'Find Vendors for All Commodity Codes' on the PO to return all vendors who registered for the NIGP codes listed on the items of the PO.
3	Select the vendor and click 'Save & Exit' – Click 'Save & Continue' and 'Close Window' or 'Find Vendors for All Commodity Codes' on the PO.

38.6.2 Set Subcontractor Requirements – Open Market PO

The subcontractor requirements determine how users will manage the subcontractor on the contract through *NevadaEPro*.

Step	Set Subcontractor Requirements - Open Marker PO Process Steps
1	Set subcontractor requirement – refer to ***Section 38.6.3, Required Field Descriptions - Set Subcontractor Requirements.***
2	Click 'Save & Continue'.

38.6.3 Required Field Descriptions - Set Subcontractor Requirements – Open Market PO

REQUIRED FIELD DESCRIPTIONS – SET SUBCONTRACTOR REQUIREMENTS – OPEN MARKET PO	
Field Name	**Functionality**
Enable prime vendor payment entry	Allows the prime vendor to record payments made to the subcontractor.
Enable prime vendor subcontractor update	Allows the prime vendor to update the subcontractor on the PO. Users do not control when subcontractors are updated.
Enable subcontractor payment acknowledgement	Allows the subcontractor to acknowledge payment from primary vendor.

REQUIRED FIELD DESCRIPTIONS – SET SUBCONTRACTOR REQUIREMENTS – OPEN MARKET PO	
Field Name	**Functionality**
Expiration Date	Date the contract between the prime vendor and subcontractor ends.
Estimated Dollar	Estimated dollar amount the prime vendor will pay the subcontractor.
Estimated Percent	Percentage of the contract the prime vendor will pay the subcontractor

38.6.4 Delete Subcontractor(s) – Open Market PO

Step	Delete Subcontractor(s) – Open Market PO Process Steps
1	Select 'Delete' – select 'Delete All' to remove all subcontractors from the PO.
2	Click 'Save & Continue' – Users may select 'Delete Subcontractor' and when saved *NevadaEPro* will delete it from the document.

38.7 ADDITIONAL TABS TO COMPLETE FOR OPEN MARKET REQUISITION

Additional Tabs to Complete for Open Market Requisition	
Tab Description	**Reference**
Vendor Tab/Vendor Performance Subtab	***Note: This functionality is currently not configured in NevadaEPro***
Address Tab	***Section 16, Address Tab – Common Tabs***
Accounting Tab	***Section 17, Accounting Tab – Common Tabs***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***
Change Orders Tab	The 'Change Order Tab' allows users to apply changes to the 'Open Market Purchase Order'. Change orders may only be applied after a PO has gone through all of its approvals. The 'Change Order Tab' is located here for when the PO has been approved and changes needs to be made. Refer to ***Section 39, Creating a Change Order on an Open Market PO.***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs***

38.8 SUMMARY TAB – OPEN MARKET PO

38.8.1 The ‘Summary Tab’ provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

38.8.2 Once the document is submitted, users cannot edit the document.

Step	Summary Tab Process Steps
1	Scroll to the bottom of the ‘Summary Tab’.
2	Click ‘Submit for Approval’.

38.9 WORKFLOW DIAGRAM

Refer to ***Section 44.12, Open Market Purchase Order Workflow Diagram.***

39. CREATING A CHANGE ORDER FOR AN OPEN MARKET PURCHASE ORDER

39.1 GENERAL

39.1.1 The change order allows users to modify the original PO after the PO is approved ('Ready to Send' status) or 'Sent' status to the Vendor.

39.1.2 Common reasons to create a PO change order are to:

39.1.2.1 Increase or decrease the quantity or unit price of an item;
39.1.2.2 Add or delete an item; or
39.1.2.3 Update the funding source(s).

Step	Creating a Change Order for an Open Market PO Process Steps
1	Click the 'Change Order Tab'.
2	Click 'Create Change Order'.
3	Go to the tab that needs to be updated. Not all fields may be updated using the change order document. Refer to the table in ***Section 39.2, Open Market PO Change Order Tabs*** for all tabs available and what can and cannot be updated when creating a change order.
4	Update appropriate tabs as needed and click 'Save & Continue' after each tab has been updated.

39.2 OPEN MARKET PO CHANGE ORDER TABS

Change Order Tabs available for an Open Market PO	
Tab Description	**Functionality**
General Tab	Tab can be updated using the change order. In addition to the protected fields, the PO type cannot be changed. All other fields may be updated.
Items Tab/General Subtab	Tab can be updated using the change order.
Items Tab/Address Subtab	Tab can be updated using the change order. Existing addresses may be replaced.
Items Tab/Accounting Subtab	Tab can be updated using the change order. New account codes may be added, and existing codes may be modified or deleted.
Items Tab/Notes Subtab	Tab may be updated without using the change order after the PO is approved or sent. The 'Items Tab/Notes Subtab' will not appear on the change order, however, may be updated by going to the PO.

Change Order Tabs available for an Open Market PO	
Vendor Tab/General Subtab	Tab cannot be updated using the change order. If users need to change the vendor on the PO, users must cancel the current PO and create a new one.
Subcontractors Tab	Tab can be updated using the change order. New subcontractors may be added, and existing subcontractors may be deactivated. Refer to ***Section 39.3, Deactivate a Subcontractor – Open Market Change Order.***
Address Tab	Tab can be updated using the change order and existing addresses may be replaced.
Accounting Tab	Tab can be updated using the change order. New account codes may be added, and existing account codes may be modified or deleted.
Routing Tab	Tab cannot be updated using the change order. It can only be viewed by a user after the PO is sent.
Attachments Tab/Agency Subtab	Tab can be updated using the change order. New attachments may be added, and existing attachments may be modified or deleted.
Attachments Tab/Vendor Subtab	Tab can be updated using the change order. New attachments may be added, and existing attachments may be modified or deleted.
Notes Tab	Tab may be updated without using the change order after the PO is approved or sent. The 'Notes Tab' will not appear on the change order, however, may be updated by going to the PO.
Reminders Tab	Tab may be updated without using the change order after the PO is approved or sent. The 'Reminders Tab' will not appear on the change order, however, may be updated by going to the PO.

39.3 DEACTIVATE A SUBCONTRACTOR - OPEN MARKET PO CHANGE ORDER

Step	Deactivate a Subcontractor – Open Market PO Change Order Process Steps
1	Select 'Deactivate'.
2	Select 'Reason' from dropdown – if the reason is not listed in the dropdown, enter the reason in the other box.
3	Click 'Save & Continue'.

39.4 SUMMARY TAB – OPEN MARKET PO CHANGE ORDER

The 'Summary Tab' cannot be updated using the Change Order. However, the 'Summary Tab' of the Change Order can be updated.

Step	Summary Tab - Open Market Change Order Process Steps
1	Complete the 'Comments' for the whole Change Order.
2	Review the changes (refer to ***Section 39.4.1, Change Order Field Descriptions***).
3	Click 'Save & Continue'.
4	Click 'Submit for Approval' – once the Change Order is approved, users must 'Apply the Change Order'.
5	Click 'Apply the Change Order'.

39.4.1 Change Order Field Descriptions – Open Market PO

CHANGE ORDER FIELD DESCRIPTIONS – OPEN MARKET PO	
Field Name	**Functionality**
Show to vendor	Allows the changes to be visible to the vendor. When unchecked, the vendor will not see the changes.
Bilateral change order Enabled	Bilateral change orders allow the agency to create a change order to a PO and request the vendor to approve the change. Checking bilateral change order, requires the vendor to approve the change order before it is applied

40. CREATING A MASTER BLANKET PURCHASE ORDER (MBPO)

40.1 GENERAL

40.1.1 *NevadaEPro* allows BP Users to create MBPOs.

40.1.2 Generally, the MBPO documents a contract with vendor(s) for a specific period of time, a term agreement, for an indefinite quantity of goods or services.

40.1.3 The term agreement may include a fixed price catalog, a discount on a catalog of market value pricing, or categories of goods or services that require a secondary round of competition.

40.1.4 In other cases, the MBPO may be used to document a contract that has a fixed or not-to-exceed price (e.g., multi-phased construction projects).

40.1.5 Users may create an MBPO using one (1) of three (3) methods:

40.1.5.1 Create from scratch; or
40.1.5.2 Convert from an existing Requisition or Bid; or
40.1.5.3 Clone from an existing MBPO.

40.2 MASTER BLANKET PURCHASE ORDER CREATION

Step	MBPO Creation Process Steps
1	Click the ‘Plus (+) Icon’.
2	Click ‘Contract’ in the dropdown to create an MBPO from scratch.
3	Select ‘Create a Purchase Order from Scratch’.
4	Select ‘Blanket’ from the ‘PO Type of the New Purchase Order’ dropdown.
5	Click ‘Continue’ – Users may select ‘Cancel & Exit’ to exit out of the page and return to the Homepage.

40.3 GENERAL TAB – MBPO

40.3.1 The purpose of the ‘General Tab’ is to capture header level data for the specific document.

40.3.2 Each document template is blank when created from scratch.

40.3.3 Users must complete all required fields on the ‘General Tab’ and save the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

Step	MBPO General Tab Process Steps
1	Complete 'Required Fields' - Refer to ***Section 40.3.4, Required Field Descriptions - MBPO General Tab***. Users must complete all required fields marked with an asterisk (*) on the 'General Tab', including custom columns that have additional responses required, before saving the new document.
2	Click 'Save & Continue': a) Once the user saves the document, protected fields are auto-filled. b) The document will now be searchable in *NevadaEPro* by an authorized user, including from the user's Homepage. c) Refer to ***Section 40.3.5, Protected Field Descriptions - MBPO General Tab***'.
3	Complete 'Optional Fields' as applicable – refer to ***Section 40.3.6, Optional Field Descriptions - MBPO General Tab.***
4	Click 'Save & Continue'.
6	Click 'Items Tab'.

40.3.4 Required Field Descriptions – MBPO General Tab

REQUIRED FIELD DESCRIPTIONS – MBPO GENERAL TAB	
Field Name	**Functionality**
Short Description	Description of the goods or services to be procured – should be descriptive and unique. Searchable in internal and external searches.
Department	Originating department of the document. Ship-to and Bill-to addresses are made available based on the department selected. Configured to trigger approval paths.
Location	Originating location of the document. Searchable in internal searches. Configured to trigger approval paths.
Print Format	PO Print – includes internal information, e.g., accounting information. Vendor Print – for external use. It is recommended not to print Purchase Orders.

40.3.5 Protected Field Descriptions – MBPO General Tab

PROTECTED FIELD DESCRIPTIONS – MBPO GENERAL TAB	
Field Name	**Functionality**
PO Number	Automatically generated upon the first save. Searchable in internal and external searches. Configured to reflect the originating organization or department, document fiscal year, and sequential number.

PROTECTED FIELD DESCRIPTIONS – MBPO GENERAL TAB	
Field Name	**Functionality**
Release	Sequential number of the release off the Master Blanket. On Master Blanket, release will display as ‘0’.
Status	Initial status is set to ‘In Progress’ and will update as the PO is processed and if the document is editable.
Fiscal Year	Fiscal year in which the document was created.
Organization	Originating organization of the document. May not be visible in certain statuses by other organizations. May be used for approval paths.
Entered Date	Automatically generated upon first save. Used as an audit trail and for reporting.
Actual Cost	Automatically generated upon first save. Used as an audit trail and for reporting.
Date Last Updated	Automatically generated upon first save. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon first save. Used as an audit trail and for reporting.

40.3.6 Optional Field Descriptions – MBPO General Tab

OPTIONAL FIELD DESCRIPTIONS – MBPO GENERAL TAB	
Field Name	**Functionality**
Purchaser	Dropdown of BP Users in organization of the document which allows user to assign a new purchaser if the original BP User cannot complete the MBPO.
Receipt Method	PO items are received by quantity or dollars. Determines how receiving can be completed for the MBPO. Generally, goods are received by quantity and services by dollars.
PO Type	Determines PO template that will be utilized. Blanket - indefinite quantity agreement for a term.
Seller Blanket Change Order Enabled	Allows vendors to create change orders and submit to BP User to apply or delete. Used to allow vendor to maintain catalog items.
Solicitation Enabled	Used only for release requisitions. Allows users to create a bid among the listed distributors on the Master Blanket. Used for multi-vendor contracts when a secondary level of competition is needed.
Type Code	***Note: Functionality is not configured in NevadaEPro.***
Release Type	Direct Release: Requisition is sent directly to vendor after approvals. Standard Release: Requisition is routed to purchaser before it is sent to vendor.

OPTIONAL FIELD DESCRIPTIONS – MBPO GENERAL TAB	
Field Name	**Functionality**
	RPA Release: Determines the type of subsequent release requisitions allowed.
RPA Release Allowed	Allows RPA releases in addition to either direct or standard releases. DA Users can create RPA releases when checked. Allows users to purchase on-contract goods or services outside of *NevadaEPro* and enter them after the fact.
Print Dest Detail	Determines the form generated when print button on the 'Summary Tab' is clicked. It is recommended not to print.
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Control Code	***Note: Functionality is not configured in NevadaEPro.***
Days ARO	The number of days after receiving the order by which the vendor should deliver the goods.
Retainage %	Percent of payment to be withheld pending completion of services of delivery of goods. Often used for construction contracts.
Discount %	Percentage of discount to be applied to PO. Calculated in actual cost. Used for discounted pricing.
Contact Information	Defines contact for the PO, typically the purchaser or contract manager.
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***

40.4 ITEMS TAB/GENERAL SUBTAB - MBPO

40.4.1 The 'Items Tab/General Subtab' captures what goods or services users will be purchasing on the MBPO,

40.4.2 Users may add items using one (1) of three (3) methods:

40.4.2.1 Search for existing items; or
40.4.2.2 Add items from scratch; or
40.4.2.3 Upload/export items from a spreadsheet.

40.4.3 Refer to ***Section 10, Items Tab/General Subtab – Common Tabs***.

40.4.4 Upload/Export Items

40.4.4.1 The 'Upload/Export Items' method is commonly used when users have a large number of items to add to the MBPO.

40.4.4.2 Users must have specific privileges to upload items on a PO.

Step	Export Items Process Steps
1	Click ‘Export Items’
2	Click ‘Open’: a) The information is exported to an Excel document. b) Users may update and save the document to the desktop.

Step	Import Items Process Steps
1	Click ‘Upload Items’.
2	Click ‘Browse’.
3	Select ‘CSV File’ – the file selected must conform to the requirements of system templates for this purpose.
4	Click ‘Save & Exit’ – Click ‘Save & Continue’ to continue adding items or click ‘Cancel & Exit’ to return to the last page.
5	Review and update items, if applicable – Users may review items entered and update by clicking the ‘Item #’.
6	Click ‘Items Tab/Notes Subtab’: a) The import file must adhere to a specific CSV file format. b) The most straightforward way to obtain a CSV file in this format is to select ‘Export Items’. This will initiate a file download of the existing items on the document. c) This CSV file can be used to add additional items to the document or to update existing items on the document.

40.5 ITEMS TAB/NOTES SUBTAB - MBPO

Refer to ***Section 15, Items Tab/Notes Subtab – Common Tabs***.

40.6 VENDORS TAB/GENERAL SUBTAB - MBPO

The ‘Vendor Tab’ allows users to select the Vendor who will fulfill orders (Releases) against the MBPO.

Step	Adding Vendor(s) to an MBPO Process Steps
1	Click ‘Lookup and Add Vendor’ – Users may enter any of the search criteria and click ‘Find It’.
2	Enter search criteria and click ‘Find It’ – to return all vendors, leave search criteria blank before clicking ‘Find It’.

Step	Adding Vendor(s) to an MBPO Process Steps
3	Select the vendor and click 'Add Vendor' – Click the arrows to view additional search results or click 'Close Window' to return to the last page without adding a vendor.
4	Click 'Save & Continue': a) Click 'Lookup & Change Vendor' to change the vendor. b) Users may also update the PO terms to reflect the vendor's preferred terms or terms specific to the MBPO.

40.6.1 Select a different Remit or PO Mailing Address

If vendors require a different 'Remit or PO Mailing Address' than what is showing as the default address, users may update the address with any other address listed on the vendor's profile.

Step	Select Different Remit or PO Mailing Address Process Steps
1	Click the 'PO Mailing Address'.
2	Select an address – If the address is not available, the vendor must add the address to their profile before the user can update the PO.
3	Click 'Save & Continue'.
4	Click 'Vendor Tab/Subcontractors Subtab'.

40.7 VENDOR TAB/SUBCONTRACTORS SUBTAB

The 'Vendor Tab/Subcontractor Subtab' allows users to select the vendor(s) who will subcontract with the primary vendor to fulfill orders against the MBPO.

40.7.1 Add a Subcontractor

Step	Add a Subcontractor Process Steps
1	Click 'Lookup & Add Vendor Subcontractors': a) A new window will open for users to search for subcontractors. b) Users may enter any of the search criteria and click 'Find It'.
2	Enter search criteria and click 'Find It' - To return all vendors, leave search criteria blank before clicking 'Find It'.
3	Select the vendor and click 'Save & Exit': a) Click 'Save & Continue' to continue to add subcontractors or click 'Save & Next Page' to save the selected vendor(s) and view the results on other pages.

Step	Add a Subcontractor Process Steps
	b) Users can also click 'Find Vendors for All Commodity Codes on the PO' to return all vendors who registered for the NIGP codes listed on the items of the PO. c) Click 'Close Window' to return to the previous window.

40.7.2 Set Subcontractor Requirements

The subcontractor requirements determine how users will manage the subcontractor(s) on the MBPO through *NevadaEPro*. These users include both purchasers and prime vendor and subcontractor personnel.

Step	Set Subcontractor Requirements Process Steps
1	Set Subcontractor Requirements – refer to ***Section 40.7.3, Set Subcontractor Requirements Field Descriptions.***
2	Click 'Save & Continue'.

40.7.3 Set Subcontractor Requirements Field Descriptions

SET SUBCONTRACTOR REQUIREMENTS FIELD DESCRIPTIONS	
Field Name	**Functionality**
Enable prime vendor payment entry	Allows the prime vendor to record payments made to the subcontractors.
Enable prime vendor subcontractor updates	Allows the prime vendor to update the subcontractor on the MBPO.
Enable subcontractor payment acknowledgement	Allows the subcontractor to acknowledge payment from prime vendor.
Expiration Date	Date the contract between the prime vendor and subcontractor ends.
Estimated Dollar	Estimated dollar amount the prime vendor will pay the subcontractor.
Estimated Percent	Percentage of the contract the prime vendor will pay the subcontractor.

40.7.4 Delete Subcontractor(s)

Step	Delete Subcontractor(s) Process Steps
1	Select 'Delete' – Select 'Delete All' to remove all listed subcontractors from the MBPO.
2	Click 'Save & Continue' – Users may select the 'Delete' checkbox for selected subcontractor and when saved *NevadaEPro* will delete it from the document.
3	Click 'Vendor Tab/Distributors Subtab'.

40.8 VENDOR TAB/DISTRIBUTORS SUBTAB - MBPO

40.8.1 The ‘Vendor Tab/Distributors Subtab’ allows users to select the vendor(s) who are authorized to provide the goods or services listed on the ‘Items Tab’.

40.8.2 A distributor that is added to the MBPO will be authorized to provide all items on the MBPO.

40.8.3 A red vendor distributor validation error will show until user has successfully entered distributor information.

Step	Add Distributors Tab MBPO Process Steps
1	Lookup and Add Vendor/Distributors’: a) A new window will open for users to search for ‘Vendor/Distributors’. b) Users may enter any of the search criteria and click ‘Find It’.
2	Enter search criteria and click ‘Find It’ – to return all Vendor/Distributors, leave search criteria blank before click ‘Find It’.
3	Select the Vendor and click ‘Save & Exit’: a) Click ‘Save & Continue’ to continue to add vendor/distributors or click ‘Save & Next Page’ to save the selected vendor(s) and view the results on other pages. b) Click ‘Find Vendors for All Commodity Codes on the PO’ to return all vendor/distributors who registered for the NIGP codes listed on the items on the MBPO. c) Click ‘Close Window’ to exit out of the new window.
4	Complete Optional Fields as preferred (refer to ***Section 40.8.4, Optional Field Descriptions – MBPO Vendor/Distributor.***
5	Click ‘Save & Continue’ – the user can click ‘Look & Add Vendor Distributors to change the selected vendor/distributors.

40.8.4 Optional Field Descriptions - MBPO Vendor/Distributor

OPTIONAL FIELD DESCRIPTIONS – MBPO VENDOR/DISTRIBUTOR	
Field Name	**Functionality**
Vendor Distributor Status	Designates vendor as active distributor. Non-active vendors cannot receive releases.
Include Primary Vendor in the Vendor Distributor List	Field must be checked.

40.8.5 Delete Vendor/Distributor(s) – MBPO

Step	Delete Vendor/Distributors MBPO Process Steps
1	Select the ‘Vendor/Distributor’ under the ‘Delete’ column – Users can select ‘Delete All’ to delete all vendor/distributors.
2	Click ‘Save & Continue’ – Click ‘Reset’ to undo the delete action.

40.9 VENDOR TAB/VENDOR PERFORMANCE SUBTAB

Note: This functionality is currently not configured in NevadaEPro.

40.10 ROUTING TAB

Refer to ***Section 18, Routing Tab – Common Tabs***.

40.11 CONTROL TAB

40.11.1 The ‘Control Tab’ allows users to:

40.11.1.1 Designate the term of the contract;
40.11.1.2 Who is authorized to use the MBPO;
40.11.1.3 Order limits; and
40.11.1.4 Minimum order amounts.

40.11.2 Refer to ***Section 40.11.4, Add Organizations - MBPO*** for MBPOs that allow other organizations to order.

40.11.3 Refer to ***Section 40.11.6, Add Departments - MBPO*** for MBPOs that allow only departments within the contracting organization to order.

Step	Control Tab MBPO Process Steps
1	Click ‘Calendar Icon’ for ‘Begin Date’.
2	From the ‘Calendar’ select the ‘Master Blanket Contract/Begin Date’.
3	Click ‘Done’.
4	Click ‘Calendar Icon’ for ‘End Date’.
5	From the ‘Calendar’ select the “Master Blanket/Contract End Date’.
6	Click ‘Done’.

40.11.4 Add Organizations - MBPO

Step	Add Organization MBPO Process Steps
1	Click ‘Cooperative Purchasing Allowed’ – This checkbox allows users in other organizations to create ‘Release Requisitions (e.g., orders) against the MBPO.
2	Click the ‘Magnifying Icon’ to select organization(s) – A new window will open for users to select departments.
3	Click ‘Find It’ – to return all results, do not enter any search criteria.
4	Select ‘ALL ORG – Organization Umbrella Master Control’: a) Organization Umbrella Master Control allows all organizations to order against the MBPO. b) Users can also select an individual organization. c) After the first organization is added, *NevadaEPro* adds new blank lines to complete. Click ‘Close Window’ to exit out of the new window.
5	Click ‘Select’.
6	Click ‘Save & Continue’.
7	Complete other ‘Control Tab ’ fields as preferred. Refer to ***Section 40.11.5, Additional Organization Control Tab Field Descriptions - MBPO.***
8	Click ‘Save & Continue’.

40.11.5 Additional Organization Control Tab Field Descriptions - MBPO

ADDITIONAL ORGANIZATION CONTROL TAB FIELD DESCRIPTIONS - MBPO	
Field Name	**Functionality**
Dollar Limit	Sets the spending limit. Once the dollar limit is reached users will no longer be able to create releases.
Minimum Order Amount	Minimum dollar amount to create a release order. Users will receive an error message if release PO is below the minimum order amount.

40.11.6 Add Departments - MBPO

Step	Add Departments MBPO Process Steps
1	Click the ‘Magnifying Icon’ to select department(s) – A new window will open for users to select departments.
2	Click ‘Find It’ – to return all results, do not enter any search criteria.

Step	Add Departments MBPO Process Steps
3	Select a 'Department': a) After the first department is added, *NevadaEPro* adds new blank lines users can complete. b) Click 'Close Window' to exit out of the new window.
4	Click 'Select' – Click 'Close Window' to exit out of the new window.
5	Click 'Save & Continue'.
6	Complete other 'Control Tab' fields as preferred per ***refer to Section 40.11.7, Additional Department Control Tab Field Descriptions - MBPO.***
7	Click 'Save & Continue' – Click 'Reset' to erase the entered information.

40.11.7 Additional Department Control Tab Field Descriptions - MBPO

ADDITIONAL DEPARTMENT CONTROL TAB FIELD DESCRIPTIONS - MBPO	
Field Name	**Functionality**
Dollar Limit	Sets the spending limit. Once the dollar limit is reached users will no longer be able to create releases.
Minimum Order Amount	Minimum dollar amount to create a release order. Users will receive error message if release PO is below the minimum order amount.

40.11.8 Delete Organizations or Departments

Step	Delete Organizations or Departments MBPO Process Steps
1	Select the agency under the 'Delete' column – Select 'Delete All' to delete all departments.
2	Click 'Save & Continue' – Click 'Reset' to undo the delete action.
3	Click 'Attachments Tab/General Subtab'.

40.12 ATTACHMENTS TAB/GENERAL SUBTAB - MBPO

This subtab is intended to hold agency related attachments associated with the MBPO. Refer to ***Section 19, Attachments Tab/Vendor Subtab – Common Tabs***.

40.12.1 Files

Files are documents that are completed outside of *NevadaEPro*, saved, and uploaded to the document.

40.12.2 Forms

Forms are documents that are completed electronically in *NevadaEPro* by users and saved to the document.

40.13 NOTES TAB

Refer to ***Section 21, Notes Tab – Common Tabs***.

40.14 CHANGE ORDERS TAB

40.14.1 The 'Change Orders Tab' allows users to apply changes to the MBPO.

40.14.2 Change orders may only be applied after all the PO approval paths have been completed and/or the PO has been sent to the vendor.

40.14.3 The tab is here for when the PO has been approved and changes need to be made (refer to ***Section 40.20, Creating A Change Order for an MBPO***).

40.15 REMINDERS TAB

Refer to ***Section 22, Reminders Tab – Common Tabs***.

40.16 SUMMARY TAB

40.16.1 The 'Summary Tab' provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

40.16.2 Once the document is submitted, users cannot edit the document.

Step	Summary Tab MBPO Process Steps
1	Scroll to the bottom of the 'Summary Tab'.
2	Click 'Submit for Approval'.

40.17 WORKFLOW DIAGRAM

Refer to ***Section 44.13, Master Blanket Purchase Order Workflow Diagram.***

40.18 CREATING AN MBPO FROM AN APPROVED REQUISITION OR BID

40.18.1 A new MBPO may also be created through the conversion of an approved requisition (Open Market) or approved bid.

40.18.2 After the conversion, the new MBPO will be in 'In Progress' status, the vast majority of fields are editable in this status.

Step	Creating an MBPO from an Approved Requisition or Bid Process Steps
1	Locate the 'Approved Requisition' or 'Bid' for conversion.
2	Click the 'Summary Tab' and scroll to the bottom.
3	Click 'Convert to PO'.

40.19 CLONING AN MBPO

40.19.1 A new MBPO may also be created through 'Cloning' an existing MBPO (in any status).

40.19.2 The new MBPO will largely be a mirror image of the MBPO from which it is cloned (excepting subcontractors).

40.19.3 After cloning, the new MBPO will be in 'In Progress' status, the vast majority of fields are editable in this status.

Step	Cloning an MBPO Process Steps
1	Locate the MBPO to be 'Cloned'.
2	Click the 'Summary Tab' and scroll to the bottom.
3	Click 'Clone PO'.

40.20 CREATING A CHANGE ORDER FOR AN MBPO

40.20.1 The change order allows users to modify the original MBPO after it is approved or sent to the vendor.

40.20.2 Common reasons to create a PO Change Order are to:

40.20.2.1 Increase or decrease the quantity or unit price of an item;
40.20.2.2 Add or delete an item; or
40.20.2.3 Update the 'Control Tab'.

Step	Creating a Change Order for an MBPO Process Steps
1	Click the 'Change Order Tab'.
2	Click 'Create Change Order'.
3	Select the tab that needs to be updated. Not all fields may be updated using the change order document. Refer to the table in ***Section 40.21, MBPO Change Order Tabs*** for all tabs available and what can and cannot be updated when creating a change order.
4	Update appropriate tabs as needed and click 'Save & Continue' after each tab has been updated.

40.21 MBPO CHANGE ORDER TABS

Change Order Tabs available for an MBPO	
Tab Description	**Functionality**
General Tab	Tab can be updated using the change order. In addition to the protected fields, the PO type cannot be changed. All other fields may be updated.
Items Tab/General Subtab	Tab can be updated using the change order. The protected fields in the section for 'Items Tab' cannot be changed using the change order. All other fields may be updated.
Items Tab/Notes Subtab	Tab may be updated without using the change order after the PO is approved or sent. The 'Items Tab/Notes Subtab' will not appear on the change order, however, may be updated by going to the PO.
Vendor Tab/General Subtab	Tab cannot be updated using the change order. If users need to change the vendor on the MBPO, users must cancel the current MBPO and create a new one.
Subcontractors Tab	Tab can be updated using the change order. New subcontractors may be added, and existing subcontractors may be deactivated. Refer to ***Section 40.22, Deactivate a Subcontractor – MBPO Change Order.***
Distributors Tab	Tab can be updated using the change order. New distributors may be added, and existing distributors may be deleted.
Routing Tab	Tab cannot be updated using the change order. the 'Routing Tab' will only show the approval paths for the MBPO, not the approval paths of the change order.
Attachments Tab/Agency Subtab	Tab can be updated using the change order. New attachments may be added, and existing attachments may be modified or deleted.
Attachments Tab/Vendor Subtab	Tab can be updated using the change order. New attachments may be added, and existing attachments may be modified or deleted.
Notes Tab	Tab may be updated without using the change order after the PO is approved or sent. The 'Notes Tab' will not appear on the change order, however, may be updated by going to the PO.
Reminders Tab	Tab may be updated without using the change order after the PO is approved or sent. The 'Reminders Tab' will not appear on the change order, however, may be updated by going to the PO.

40.22 DEACTIVATE A SUBCONTRACTOR – MBPO CHANGE ORDER

Step	Deactivate a Subcontractor - MBPO Change Order Process Steps
1	Select ‘Deactivate’.
2	Select ‘Reason’ from dropdown – if the reason is not listed in the dropdown, enter the reason in the ‘Other’ box.
3	Click ‘Save & Continue.

40.23 SUMMARY TAB – MBPO CHANGE ORDER

The ‘Summary Tab’ of the MBPO cannot be updated using the change order, however, the ‘Summary Tab’ of the change order itself can be updated.

Step	Summary Tab - MBPO Change Order Process Steps
1	Complete the ‘Comments for the Whole Change Order’.
2	Review the changes.
3	Uncheck ‘Show to Vendor’ if preferred – For any changes that the vendor should not see, uncheck ‘Show to Vendor’.
4	Select ‘Bilateral Change Order’ if preferred – Checking ‘Bilateral Change Order’ requires the vendor to approve the change order before it is applied.
5	Click ‘Save & Continue’.
6	Submit for Approval – Once the change order is approved, users must apply the change order.
7	Click ‘Apply the Change Order’.

41. CREATING A STANDARD RELEASE PURCHASE ORDER (PO)

41.1 GENERAL

41.1.1 The standard release POs allow users to order items that are on-contract or on MBPO.

41.1.2 There are three (3) types of release POs:

41.1.2.1 Direct;
41.1.2.2 Standard; and
41.1.2.3 RPA.

41.1.3 The release type is determined by the BP User on the Master Blanket.

41.1.4 This section of the manual will address standard release type only and will outline the process for converting the release requisition into a PO and reviewing the document before sending to the vendor.

41.2 STANDARD RELEASE PURCHASE ORDER (PO)

Step	Create an Open Market Requisition Process Steps
1	Click 'Documents Ready for Approval' – If the document does not have any approval paths, search for the 'Release Requisition' and skip to Step 4 below.
2	Select the 'Requisition #' under 'Document Pending My Approval'.
3	Select 'Approve' and click 'Save & Exit'.
4	Click the 'PO Link'.

41.3 GENERAL TAB – STANDARD RELEASE PO

41.3.1 The 'General Tab' captures header level data for the specific document.

41.3.2 Many of the fields on the 'General Tab of the PO are pre-populated from the requisition.

Step	Standard Release PO General Tab Process Steps
1	Update required fields as needed (refer to ***Section 41.3.3, Required Field Descriptions - Standard Release PO General Tab***).
2	Click Save & Continue (refer to ***Section 41.3.4, Protected Field Descriptions - Standard Release PO General Tab***). *Note: Protected fields are auto filled and cannot be edited by users.*
3	Update Optional Fields as needed (refer to ***Section 41.3.5, Optional Field Descriptions - Standard Release PO General Tab***).
4	Click 'Items Tab'.

41.3.3 Required Field Descriptions - Standard Release PO General Tab

REQUIRED FIELD DESCRIPTIONS – STANDARD RELEASE PO GENERAL TAB	
Field Name	**Functionality**
Short Description	Description of the goods or services to be procured. Searchable in internal and external searches.
Department	Originating department of the document. Ship-to and Bill-to addresses are made available based on the department selected. May be configured to trigger approval paths.
Location	Originating location of the document. Searchable in internal searches. May be configured to trigger approval paths.
Print Format	PO Print – Includes internal information, e.g., accounting information. Vendor Print – For external use. It is recommended not to print Pos.

41.3.4 Protected Field Descriptions - Standard Release PO General Tab

PROTECTED FIELD DESCRIPTIONS – STANDARD RELEASE PO GENERAL TAB	
Field Name	**Functionality**
PO Number	Automatically generated after requisition is converted to PO. Searchable in internal searches. Configured to reflect the originating organization or department; document fiscal year; and sequential number plus the release number after the colon.
Release	Automatically generated. Release number from the MBPO. Searchable in internal searches. Used as an audit trail and for reporting.
Status	Initial status is set to 'In Progress' and will update as the PO is processed and identify if the document is editable.
Fiscal Year	Fiscal year in which the document was created. Indicator to the State's financial system of the fiscal year.
Organization	Originating organization of the document. May not be visible in certain statuses by other organizations. Can be used to trigger approval paths.
Entered Date	Automatically generated. Used as an audit trail and for reporting.
Date Last Updated	Automatically generated. Used as an audit trail and for reporting.
User Last Updated	Automatically generated upon the first save. Used as an audit trail and for reporting.

41.3.5 Optional Field Descriptions - Standard Release General Tab

OPTIONAL FIELD DESCRIPTIONS – STANDARD RELEASE PO GENERAL TAB	
Field Name	**Functionality**
Receipt Method	PO items are received by quantity or dollars. Determines how receiving can be completed for the PO. Generally, goods are received by quantity and services by dollars
PO Type	Determines PO template that will be utilized. Not used since the PO is a release PO. Any edit to this field will not impact the document because it cannot be changed.
Solicitation Enabled	Only for release requisitions. Allows the user to create a bid among the listed distributors on the master blanket. Used for multi-vendor contracts when a secondary level of competition is needed.
Type Code	***Note: Functionality is not configured in NevadaEPro.***
Print Dest. Detail	Determines the form generated when print button on the 'Summary Tab' is clicked. Defaults to default print form. It is recommended to not print.
Alternate ID	Used by the State's financial system to store indicators and is searchable.
Required Date	Date when services or goods are needed. Often used for commodity purchases.
Promised Date	Date when goods or services will be delivered. May be used for emergency or time sensitive purchases.
Control Code	***Note: Functionality is not configured in NevadaEPro.***
Days ARO	The number of days after receiving the order by which the Vendor should deliver the goods.
Retainage %	Percent of payment to be withheld pending completion of services or delivery of goods. Often used for construction contracts.
Contact Instructions	Defines contact for the PO which is typically the purchaser or contract Manager.
Tax Rate	***Note: Functionality is not configured in NevadaEPro.***

41.4 STANDARD RELEASE PO - ADDITIONAL TABS TO COMPLETE

Standard Release PO – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/General Subtab	***Section 10, Items Tab/General Subtab – Common Tabs***
Items Tab/Address Subtab	***Section 12, Items Tab/Address Subtab – Common Tabs***
Items Tab/Accounting Subtab	***Section 13, Items Tab/Accounting Subtab – Common Tabs***

Standard Release PO – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab/Notes Subtab	***Section 15, Items Tab/Notes Subtab – Common Tabs.***
Note: Refer to Section 41.7 for additional tabs to complete.	

41.5 VENDOR TAB – STANDARD RELEASE PO

41.5.1 The 'Vendor Tab' captures the vendor(s) information for all Items on the PO.

41.5.2 The vendor data will automatically populate based on the data contained on the vendor's profile in *NevadaEPro*.

41.5.3 The user may update the vendor's remit to address on the 'Vendors Tab'.

41.5.4 If vendors require a different remit or PO mailing address than what is showing as the default address, users may update the address with any other address listed on the vendor's profile.

Step	Select a Different Remit or PO Mailing Address Process Steps
1	Select an address from 'Vendor Remit to Address' – If the address is not available, the vendor must add the address to their profile before users can update the PO.
2	Click Save & Continue.
3	Click 'Vendor Tab/Subcontractors Subtab'.

41.5.5 Users can change the vendor if there are distributors listed on the MBPO.

Step	Change Vendor Process Steps
1	Click 'Lookup and Change Vendor' – A new window will open to display the distributors.
2	Select the vendor and click 'Select' – Users can click 'Close Window' without saving the selection.

41.6 VENDOR TAB/SUBCONTRACTOR SUBTAB – STANDARD RELEASE PO

The 'Vendor Tab/Subcontractor Subtab' allows users to select the vendor that will subcontract with the primary vendor to fulfill the PO.

41.6.1 Add a Subcontractor

Step	Add a Subcontractor- Standard Release PO Process Steps
1	Click 'Lookup & Add Vendor Subcontractors' – a new window will open.

Step	Add a Subcontractor- Standard Release PO Process Steps
2	Enter search criteria and click 'Find It': a) To return all vendors, leave search criteria blank before clicking 'Find It'. b) Users may also click 'Find Vendors for All Commodity Codes' on the PO to return all vendors who registered for the NIGP codes listed on the items of the PO.
3	Select the subcontractor and click 'Save & Exit': a) Click 'Save & Continue' to continue to add subcontractors. b) Click 'Close Window' to exit out of the window without saving.

41.6.2 Set Subcontractor Requirements

The subcontractor requirements determine how users will manage the subcontractors on the PO through *NevadaEPro.*

Step	Set Subcontractor Requirements – Standard Release PO Process Steps
1	Set Subcontractor Requirements – refer to ***Section 41.6.3, Required Field Descriptions - Set Subcontractor Requirements.***
2	Click 'Save & Continue': a) Click 'Reset' to undo the entered selections. b) Click 'Lookup & Add Vendor Subcontractors' to continue to add subcontractors.

41.6.3 Required Field Descriptions – Set Subcontractor Requirements

REQUIRED FIELD DESCRIPTIONS – SET SUBCONTRACTOR REQUIREMENTS	
Field Name	**Functionality**
Enable prime vendor payment entry	Allows the prime vendor to record payments made to the subcontractor.
Enable prime vendor subcontractor updates	Allows the prime vendor to update the subcontractor on the PO. Users do not control when subcontractors are updated.
Enable subcontractor payment acknowledgement	Allows the subcontractor to acknowledge payment from primary vendor.
Effective Date	Date the contract between the prime vendor and subcontractor begins.
Expiration Date	Date the contract between the prime vendor and subcontractor ends.
Estimated Dollar	Estimated dollar amount the prime vendor will pay the subcontractor.

REQUIRED FIELD DESCRIPTIONS – SET SUBCONTRACTOR REQUIREMENTS	
Field Name	**Functionality**
Estimated Percent	Percentage of the contract the prime vendor will pay the subcontractor.
Deactivate	Date the subcontractor was deactivated for this PO.

41.6.4 Delete Subcontractor(s)

Step	Delete Subcontractor(s) – Standard Release PO Process Steps
1	Select 'Delete' for the subcontractor to be deleted – User can select 'Delete All' to delete all listed subcontractors.
2	Click 'Save & Continue'.

41.7 ADDITIONAL TABS TO COMPLETE STANDARD RELEASE PO

Additional Tabs to Complete for Standard Release PO	
Tab Description	**Reference**
Vendor Tab/Vendor Performance Subtab	***Note: This functionality is currently not configured in NevadaEPro***
Address Tab	***Section 16, Address Tab – Common Tabs***
Accounting Tab	***Section 17, Accounting Tab – Common Tabs***
Routing Tab	***Section 18, Routing Tab – Common Tabs***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab – Common Tabs***
Notes Tab	***Section 21, Notes Tab – Common Tabs***

41.8 CHANGE ORDERS TAB – STANDARD RELEASE PO

41.8.1 The 'Change Order Tab' allows users to apply changes to the 'Release Purchase Order'.

41.8.2 Change orders may only be applied after a PO has gone through all of its approvals.

41.8.3 The 'Change Order Tab' is located here for when the PO has been approved and changes need to be made (refer to ***Section 42, Creating A Change Order on a Standard Release Purchase Order).***

41.9 REMINDERS TAB – STANDARD RELEASE PO

Refer to ***Section 22, Reminders Tab – Common Tabs***.

41.10 SUMMARY TAB – STANDARD RELEASE PO

41.10.1 The ‘Summary Tab’ provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

41.10.2 Once the document is submitted, users cannot edit the document.

Step	Summary Tab - Standard Release PO Process Steps
1	Scroll to the bottom of the ‘Summary Tab’.
2	Click ‘Submit for Approval’.

41.11 WORKFLOW DIAGRAM

Refer to ***Section 44.14, Standard Release Purchase Order Workflow Diagram.***

42. CREATING A CHANGE ORDER ON A STANDARD RELEASE PO

42.1 GENERAL

42.1.1 The change order allows users to modify the original PO after the PO is approved (‘Ready to Send’ status) or sent (‘Sent’ status) to the vendor.

42.1.2 Common reasons to create a PO change order are to:

42.1.2.1 Increase or decrease the quantity or unit price of an item;
42.1.2.2 Add or delete an item; or
42.1.2.3 Update the funding source(s).

Step	Creating a Change Order for a Standard Release Purchase Order Process Steps
1	Click the ‘Change Order Tab’.
2	Click ‘Create Change Order’.
3	Go to the tab that needs to be updated. Not all fields may be updated using the change order document. Refer to the table in ***Section 42.2, Standard Release PO Change Order Tabs*** for all tabs available and what can and cannot be updated when creating a change order.
4	Update appropriate tabs as needed and click ‘Save & Continue’ after each tab has been updated.

42.2 STANDARD RELEASE PO CHANGE ORDER TABS

Change Order Tabs available for a Standard Release PO	
Tab Description	**Functionality**
General Tab	Tab can be updated using the change order. In addition to the protected fields, the PO type cannot be changed. All other fields may be updated.
Items Tab	Users can update the quantity of the item or cancel the item. Users can also add items from the MBPO to add to the PO. Refer to ***Section 42.2.1, Add Items to the Standard Release PO.***
Items Tab/Address Subtab	Tab can be updated using the change order. Existing addresses may be replaced.
Items Tab/Accounting Subtab	Tab can be updated using the change order. New account codes may be added, and existing codes may be modified or deleted. Refer to ***Section 42.2.2, Update Account Codes for the Standard Release PO.***
Subcontractors Tab	Tab can be updated using the change order. New subcontractors may be added, and existing subcontractors may be deactivated. Refer to ***Section 42.2.3, Deactivating Subcontractors on Standard Release PO.***

Change Order Tabs available for a Standard Release PO	
Address Tab	Tab can be updated using the change order and existing address may be replaced.
Accounting Tab	Tab can be updated using the change order. New account codes may be added, and existing account codes may be modified or deleted. Refer to ***Section 42.2.4, Accounting Tab Updates on Standard Release PO.***
Attachments Tab/Agency Subtab	Tab can be updated using the change order. New attachments may be added, and existing attachments may be modified or deleted. Refer to ***Section 19, Attachments Tab/Agency Subtab – Common Tabs.***
Attachments Tab/Vendor Subtab	Tab can be updated using the change order. New attachments may be added, and existing attachments may be modified or deleted. Refer to ***Section 20, Attachments Tab/Vendor Subtab – Common Tabs.***

42.2.1 Add Item(s) to the Standard Release PO

Step	Add Items – Standard Release PO Change Order Process Steps
1	Click 'Search Items'.
2	Enter search criteria for item: a) Click 'Find It' to return all items from the MBPO. b) Click 'Clear' to reset the search fields. c) Click 'Cancel & Exit' to return to the change order.
3	Enter quantity and click 'Add to Order & Exit' – Click 'Cancel & Exit' to return to the change order.

42.2.2 Update Account Codes for the Standard Release PO

Step	Update Account Codes - Standard Release PO Change Order Process Steps
1	Update account codes as needed by clicking the 'Item Number'.
2	Click 'Save Based on Percentages: a) The user can save 'Based on Dollars' as well. b) The user can click 'Reset' to undo the entered information or click 'Cancel & Exit' to exit the page without saving.

42.2.3 Deactivating Subcontractors on Standard Release PO

Step	Subcontractors Tab – Standard Release PO Change Order - Deactivate a Subcontractor Process Steps
1	Select 'Deactivate'.
2	Select 'Reason' from dropdown – if the reason is not listed in the dropdown, then enter the reason in the other box.
3	Click 'Save & Continue'.

42.2.4 Accounting Tab Updates on Standard Release PO

Step	Accounting Tab – Standard Release PO Change Order Process Steps
1	Update accounting as needed.
2	Click 'Save Based on Percentages': a) Users can save based on dollars. b) Click 'Reset' to undo the entered information.
3	Click 'Rebuild for All Items'.
4	Click 'Attachments Tab'.

42.3 SUMMARY TAB – STANDARD RELEASE PO CHANGE ORDER

Step	Summary Tab – Standard Release PO Change Order Process Steps
1	Click 'Summary Tab'.
1	Enter a comment in the text box.
2	Click 'Save & Continue'.
3	Click 'Submit for Approval' – Click 'Delete Change Order' to delete the change order.
4	Click 'Apply Change Order': a) Once the change order has been approved, users will be able to 'Apply Change Order'. b) Users can 'Delete Change Order' at this time as well.

43. CREATING A BID SOLICITATION FROM A SOLICITATION ENABLED MBPO

Users must first create a 'Release Requisition' from the MBPO that is 'Solicitation Enabled' by following the steps below:

Step	Creating a Release Requisition from the MBPO Solicitation Enabled Process Steps
1	Click the 'Plus (+) Icon'.
2	Click 'Requisition' in the dropdown.

43.1 RELEASE REQUISITION - GENERAL TAB

43.1.1 The purpose of the 'General Tab' is to capture header level data for the specific document.

43.1.2 Each document template is blank when created from scratch.

43.1.3 Users complete the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

43.1.4 Refer to ***Section 25, Creating a Standard or Direct Release Requisition***.

Step	Release Requisition General Tab Process Steps
1	Select 'Release' from the 'Requisition Type' dropdown.
2	Select 'Solicitation Enabled'.
3	Click 'Save & Continue'.

43.2 RELEASE REQUISITION – ADDITIONAL TABS TO COMPLETE

Release Requisition – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab	***Section 25.2, Items Tab/General Subtab***
Vendors Tab	***Section 25.3, Items Tab/Vendors Subtab***
Distributors Tab	Tab allows users to select the defined distributors from the MBPO. These are vendor that users want to invite to respond to the solicitation. The 'Distributors Tab' will appear when users are authorized to provide the goods or services listed on the 'Items Tab'. Select the distributor(s) and then click 'Save & Continue'.
Address Tab	***Section 16, Address Tab – Common Tabs.***
Accounting Tab	***Section 17, Accounting Tab – Common Tabs.***

Routing Tab	***Section 18, Routing Tab – Common Tabs.***
Attachments Tab/Agency Subtab	***Section 19, Attachments Tab/Agency Subtab – Common Tabs.***
Attachments Tab/Vendor Subtab	***Section 20, Attachments Tab/Vendor Subtab – Common Tabs.***
Notes Tab	***Section 21, Notes Tab – Common Tabs.***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs.***

43.3 SUMMARY TAB

43.3.1 The 'Summary Tab' provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

43.3.2 Once the document is submitted, users cannot edit the document.

43.3.3 Once the document is approved, the DA user, if granted access, or BP user will have the option to convert the requisition to bid, which is the next step.

Step	Convert Requisition to Bid Process Steps
1	Click 'Convert to Bid': a) After the release requisition is approved, users will be able to convert the release requisition to a bid solicitation document. b) Click the 'Bid Link' to navigate to the in process bid document.

43.4 GENERAL TAB – BID DOCUMENT

43.4.1 The purpose of the 'General Tab' is to capture header level data for the specific document.

43.4.2 Each document template is blank when created from scratch.

43.4.3 Users complete the information to generate a specific document number, which is a unique identifier that can be used to locate the document in *NevadaEPro*.

43.4.4 Refer to ***Section 31, Creating A Bid***.

Step	General Tab - Bid Document Process Steps
1	Review the default settings – The 'Bid Solicitation' will default to a 'Closed Bid' for the 'Bid Type' and to 'Open Market' for the 'Purchase Method'.
2	Select the 'Available Date' and the 'Bid Opening Date'.
3	Click 'Save & Continue'.

43.5 BID DOCUMENT – ADDITIONAL TABS TO COMPLETE

Bid Document – Additional Tabs to Complete	
Tab Description	**Reference**
Items Tab	***Section 31.3, Items Tab/General Subtab.*** Review the information and click 'Save & Exit'.
Bidders Tab	***Section 31.7, Bidders Tab/General Subtab.*** Review the default setting. The 'Bidders Tab' will default to a 'Restricted Bid'. Click 'Save & Continue'.
Questions Tab	***Section 31.12, Questions Tab***
Amendments Tab	***Section 31.13, Amendments Tab***
Q&A Tab	***Section 31.13.3, Turn on Q&A.***
Reminders Tab	***Section 22, Reminders Tab – Common Tabs.***

43.6 SUMMARY TAB – BID DOCUMENT

43.6.1 The 'Summary Tab' provides an overview of information provided by users on the previous tabs for review prior to submitting the document for approval.

43.6.2 Once the document is submitted, users cannot edit the document.

Step	Summary Tab - Bid Document Process Steps
1	Scroll to the bottom of the 'Summary Tab.
2	Click 'Submit for Approval'.

43.7 SENDING THE BID

When all approvals have been completed, a new 'Send Bid' button will appear at the bottom of the 'Summary Tab of the bid.

Step	Sending the Bid Process Steps
1	Click the 'Summary Tab'.
2	Select the 'Bid Action Option' – Users have the option to notify vendors or to only change the status to 'Sent'.
3	Click 'Send Bid'.
4	Click 'Ok' – If users select to notify vendors, the email recipients display on the 'Vendor Notification Result Page'.

44. WORKFLOW DIAGRAMS

44.1 GENERAL

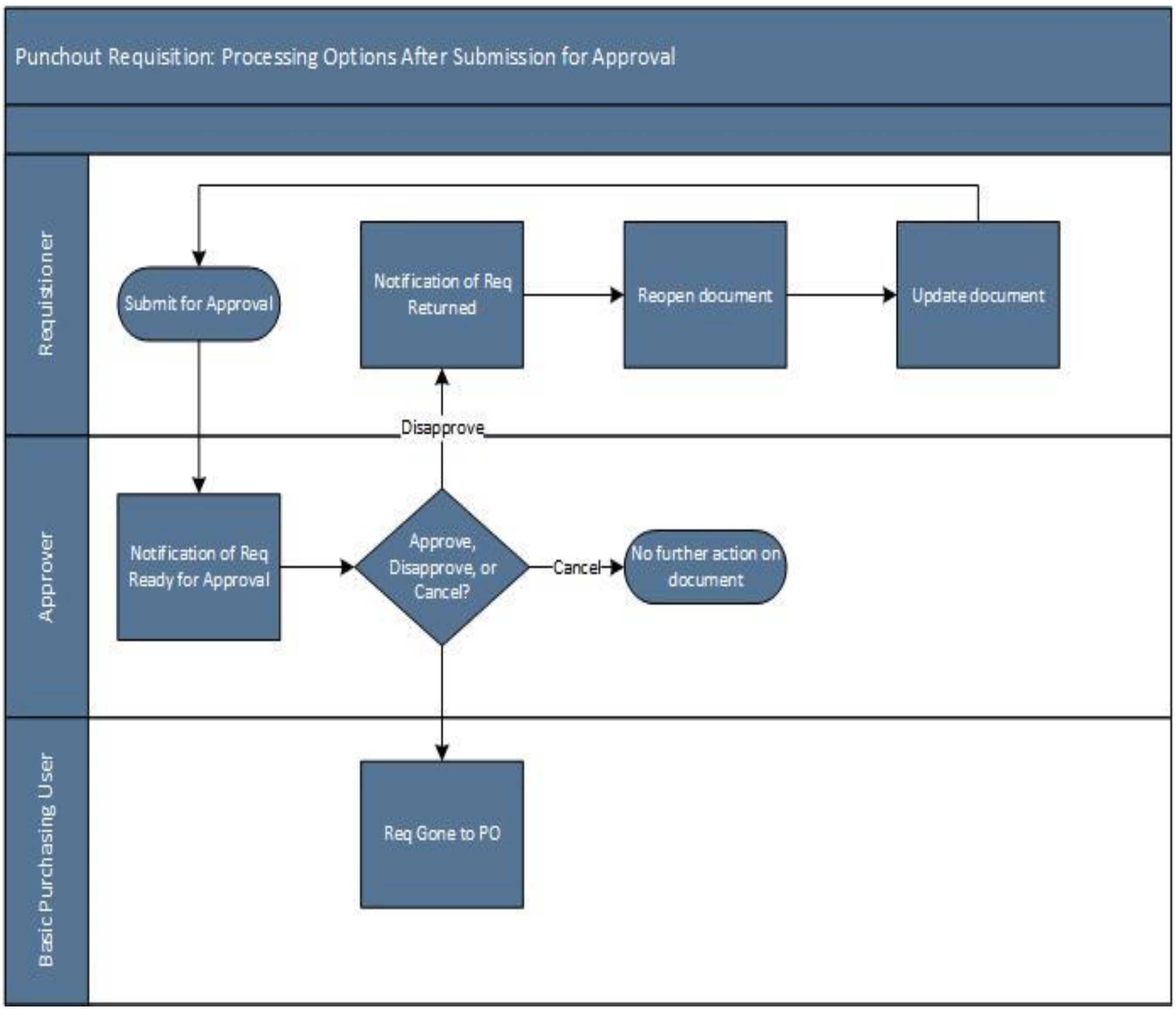
44.1.1 The following sections include workflow diagrams for each of the processes created within *NevadaEPro*

44.1.2 Each diagram is identified by the type of document being created.

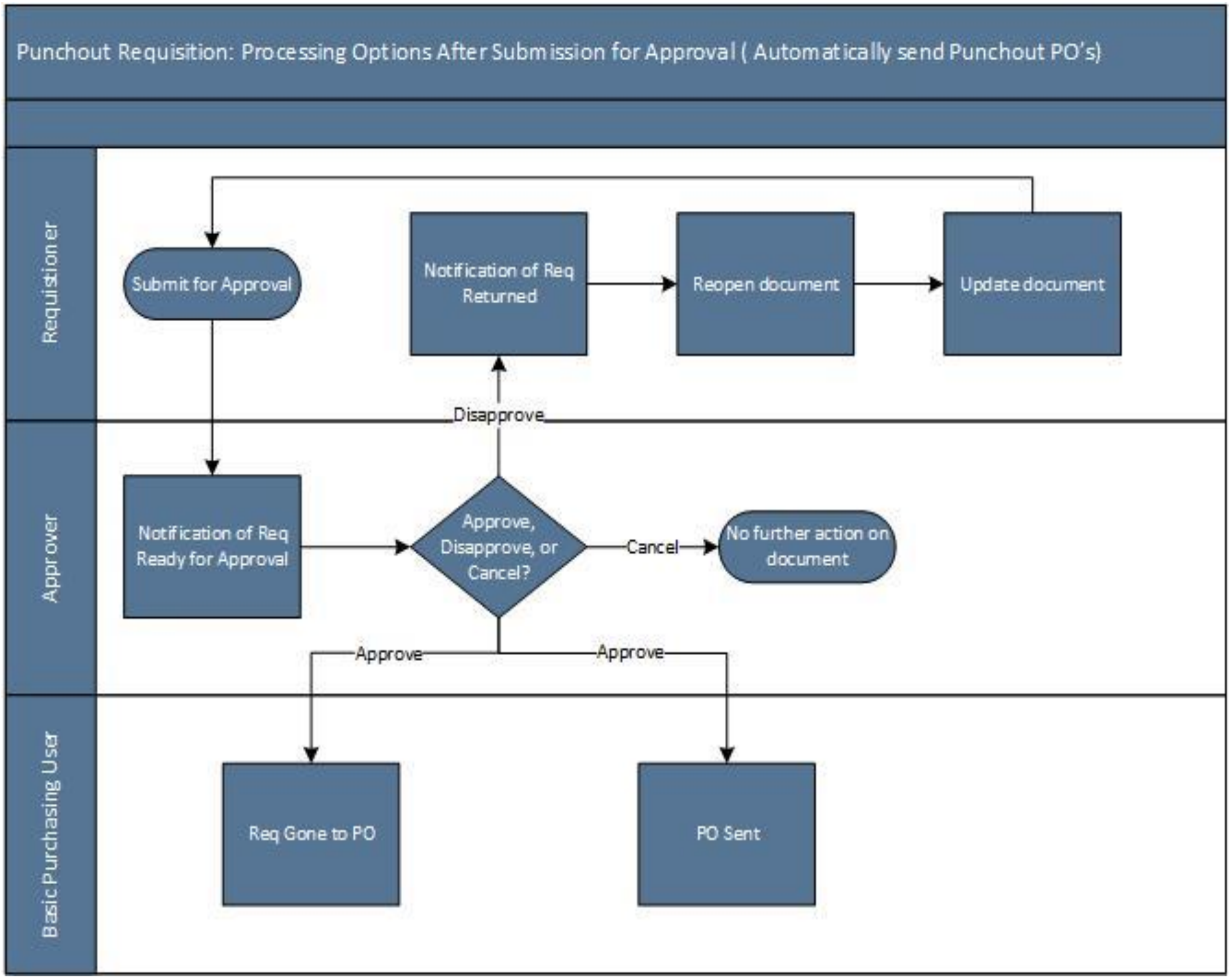
44.1.3 The purpose of the workflow diagrams is to outline the different paths the document may take through *NevadaEPro* after users submit the document for approval.

44.2 PUNCHOUT WORKFLOW DIAGRAMS

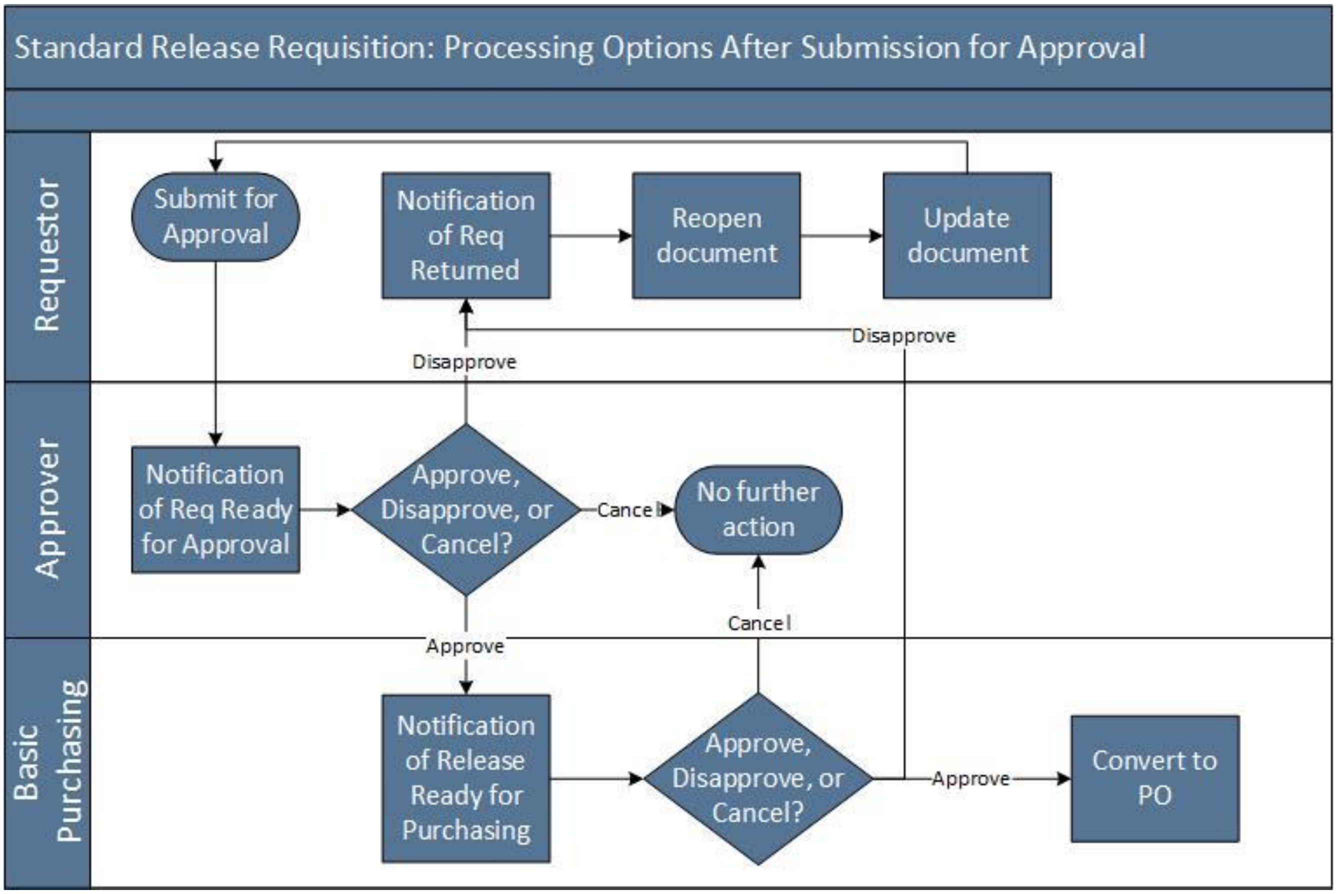
44.2.1 Processing options after submission for approval



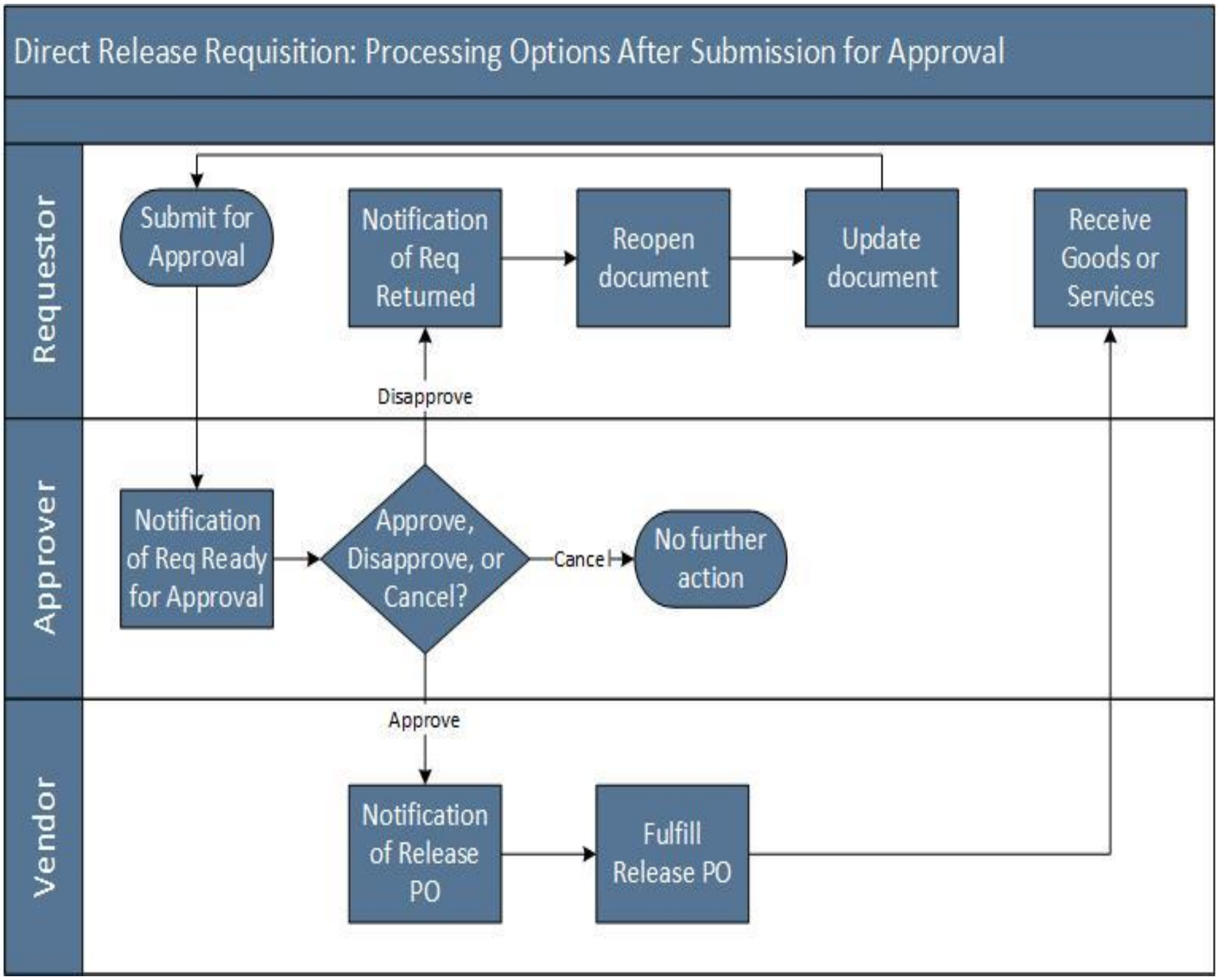
44.2.2 Processing options after submission for approval (automatically send Punchout PO)



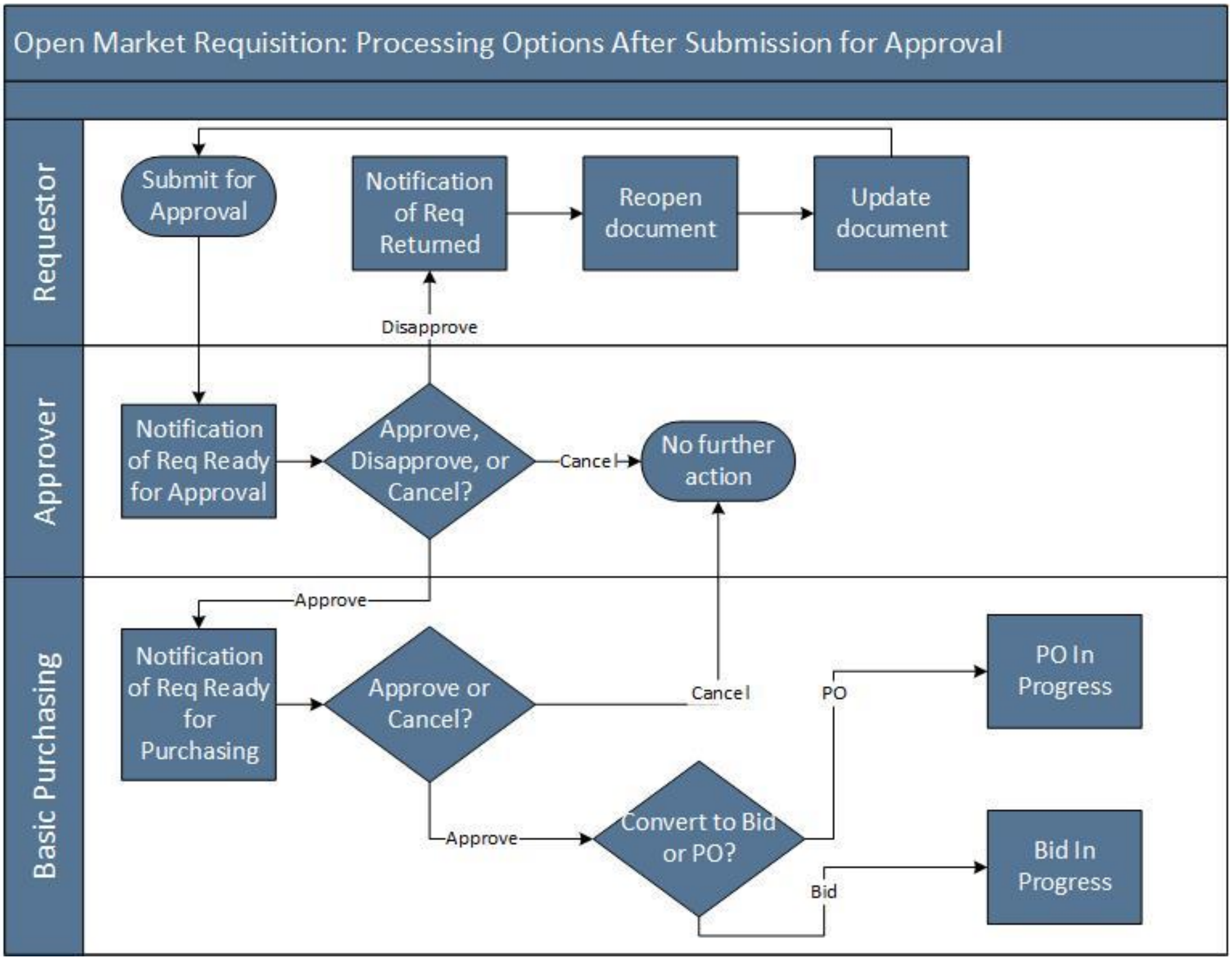
44.3 STANDARD RELEASE REQUISITION WORKFLOW DIAGRAM



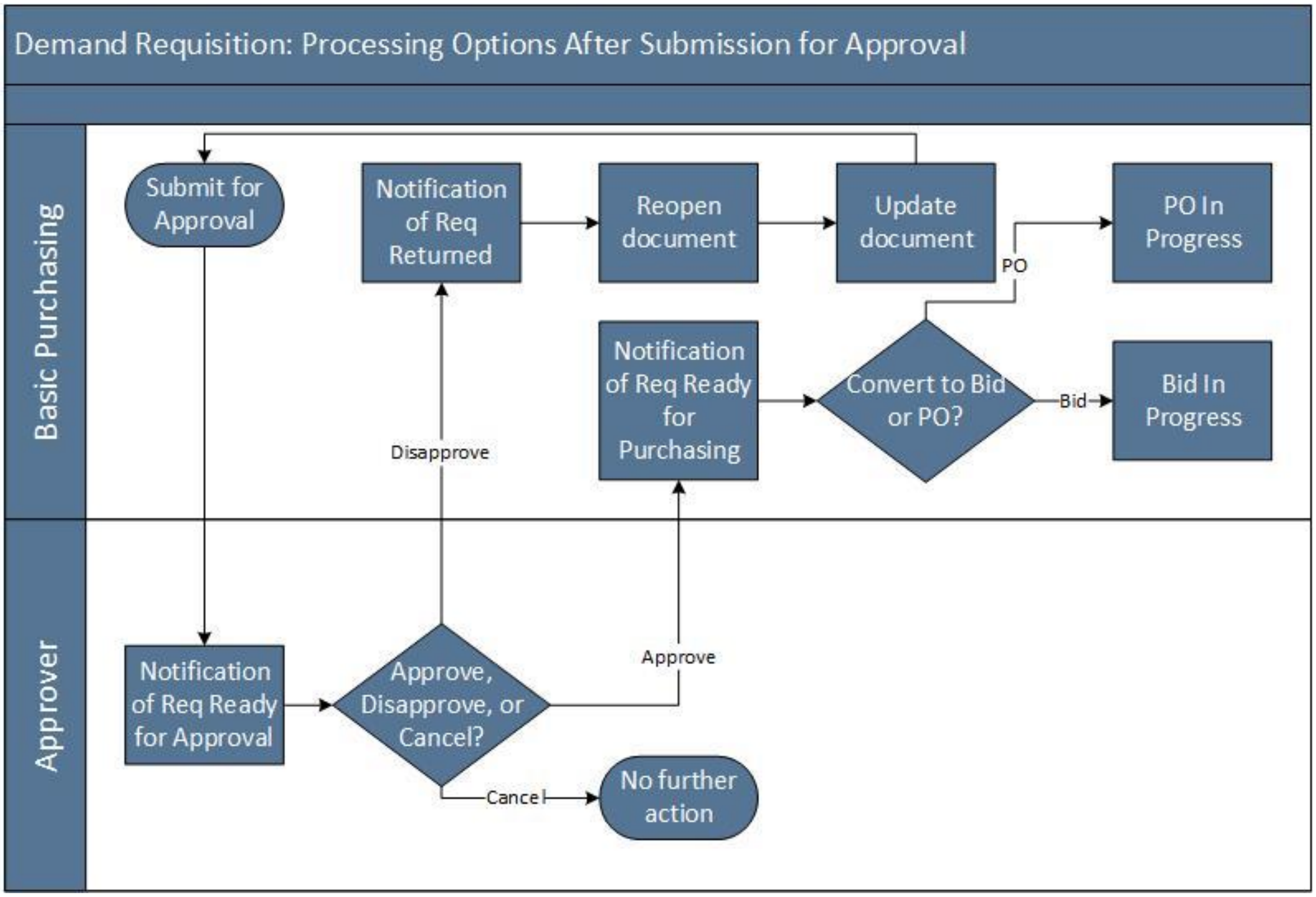
44.4 DIRECT RELEASE REQUISITION WORKFLOW DIAGRAM



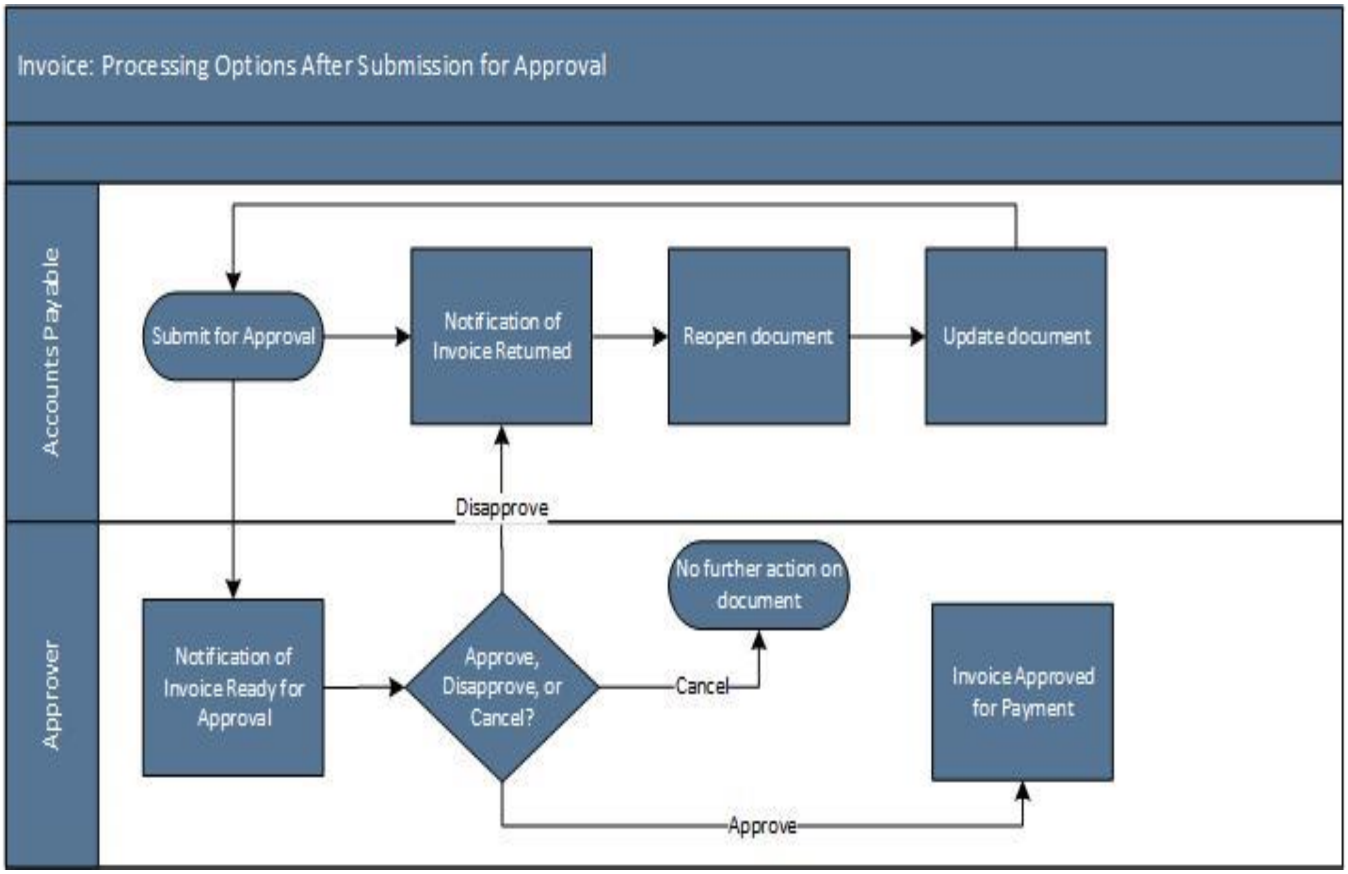
44.5 OPEN MARKET REQUISITION WORKFLOW DIAGRAM



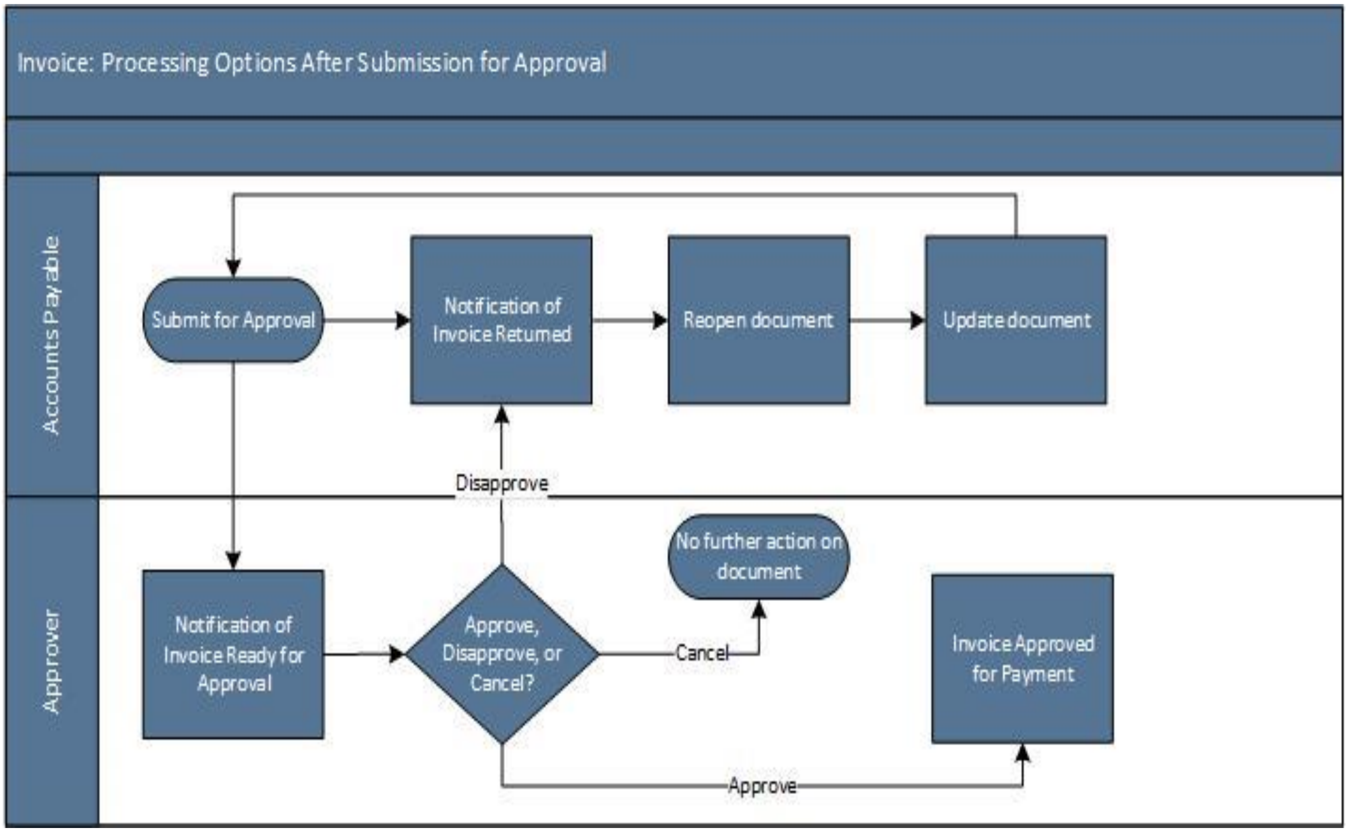
44.6 DEMAND REQUISITION WORKFLOW DIAGRAM



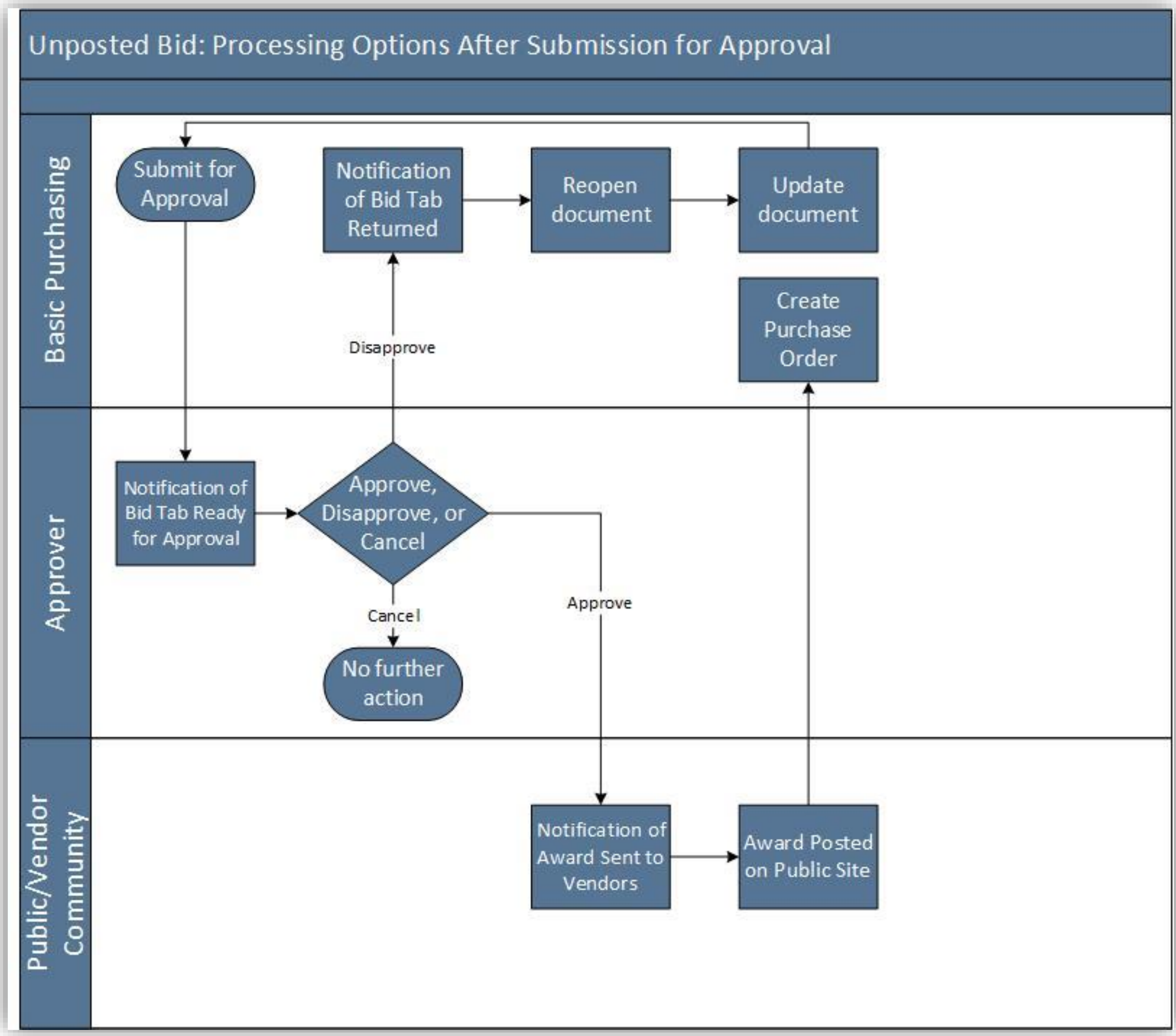
44.7 CREATING A RECEIPT WORKFLOW DIAGRAM



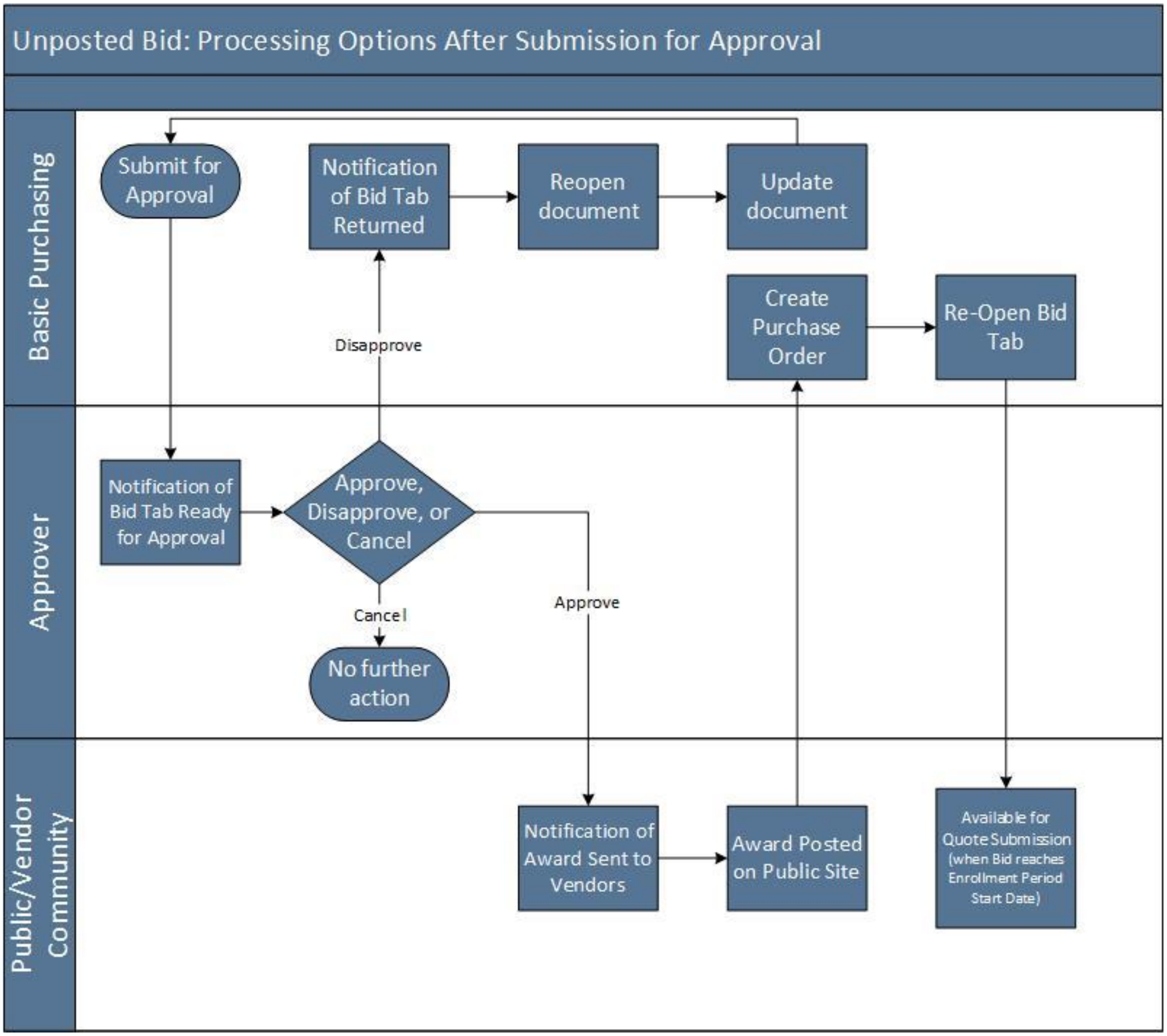
44.8 CREATING AN INVOICE WORKFLOW DIAGRAM



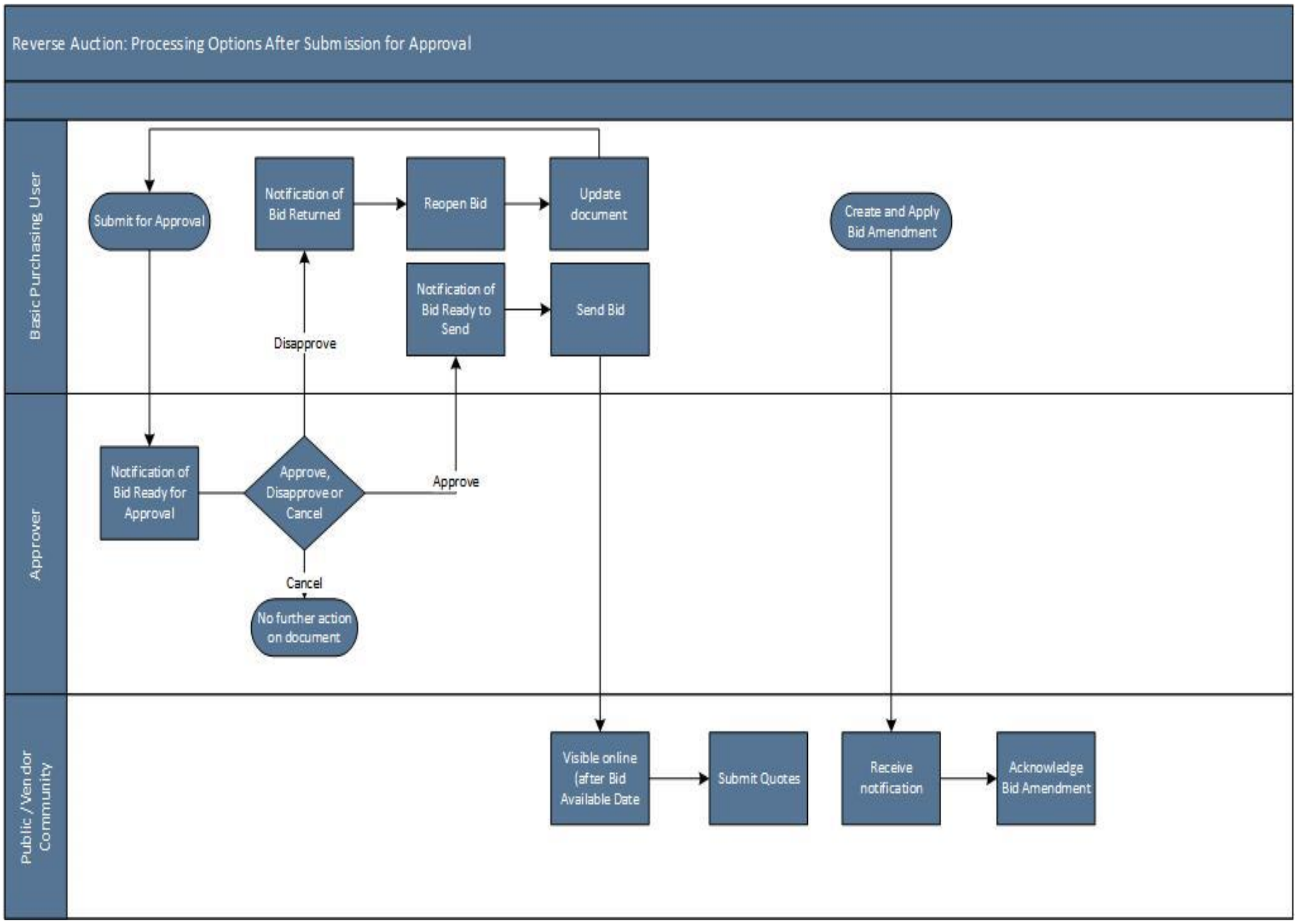
44.9 BID SOLICITATION WORKFLOW DIAGRAM



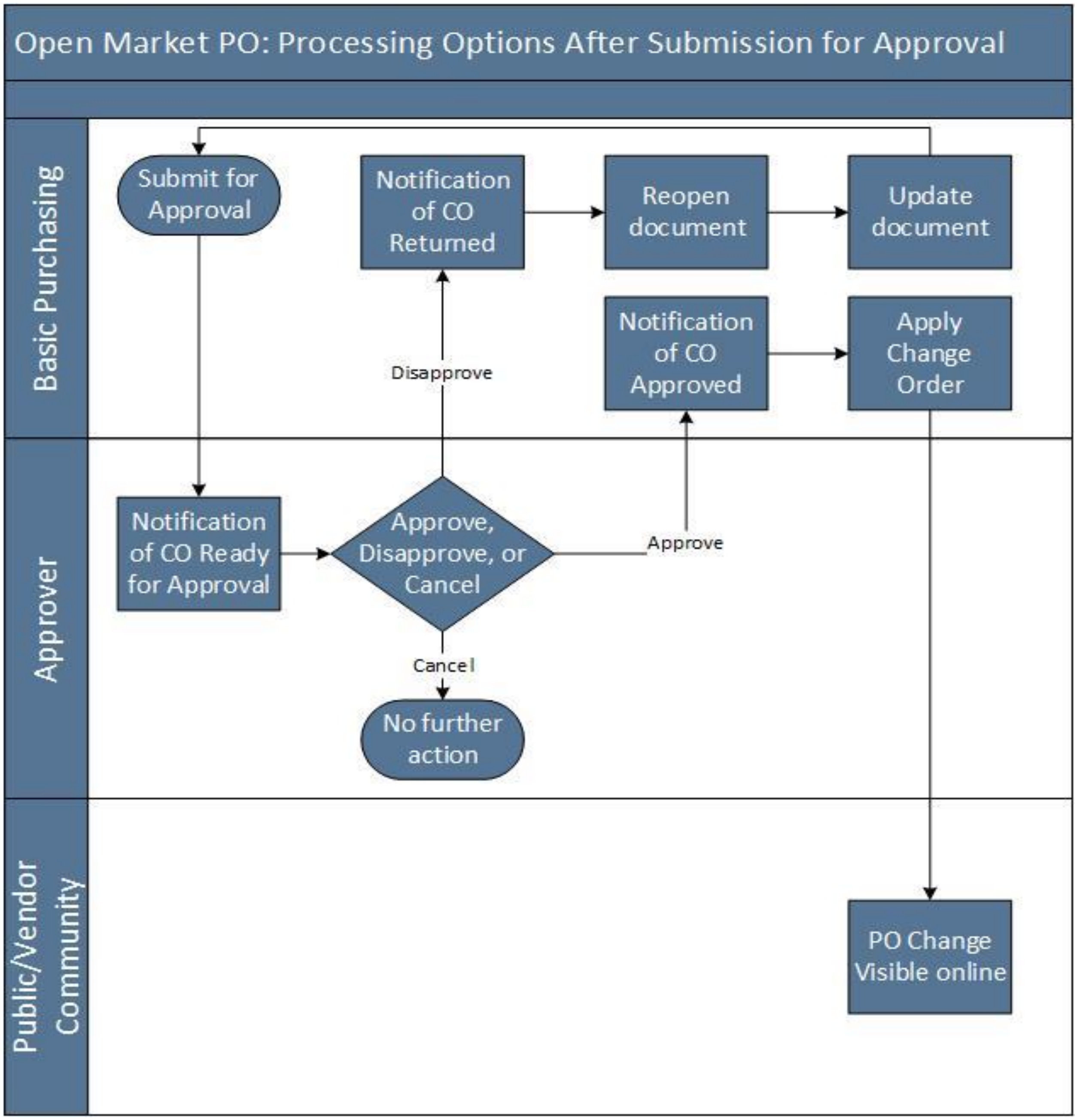
44.10 OPEN AND ROLLING ENROLLMENT BID WORKFLOW DIAGRAM



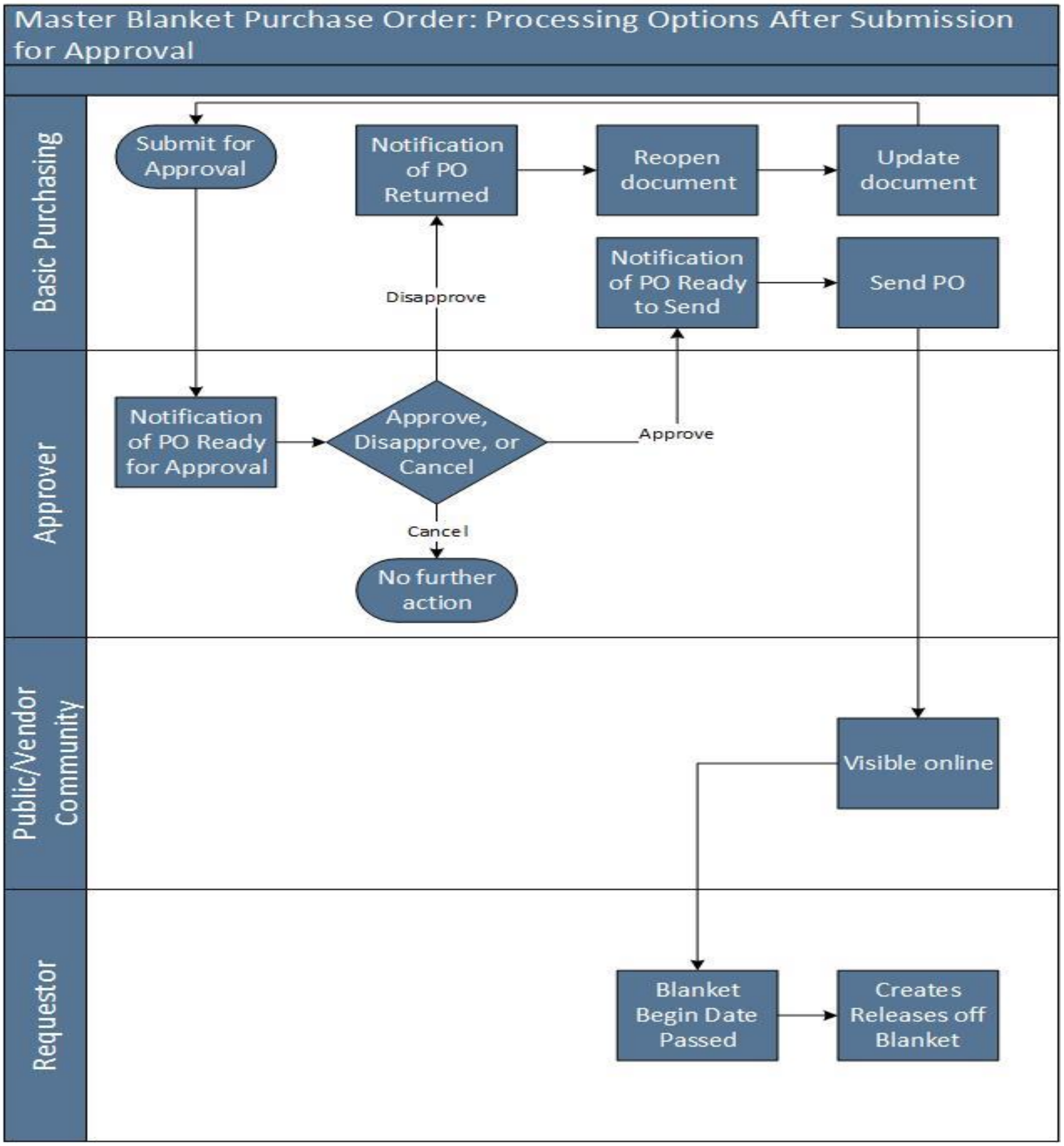
44.11 REVERSE AUCTION BID WORKFLOW DIAGRAM



44.12 OPEN MARKET PURCHASE ORDER WORKFLOW DIAGRAM



44.13 MASTER BLANKET PURCHASE ORDER WORKFLOW DIAGRAM



44.14 STANDARD RELEASE PURCHASE ORDER WORKFLOW DIAGRAM